



# How to Work with SMEs without Losing Your Mind

By Lin Laurie

# Agenda

- What SMEs Offer
- Common Challenges of Working with SMEs
- What Kind of SME Do You Need?
- Tips for Engaging with SMEs
- Questions

# What Can SMEs Offer You?

They can provide assistance to:

- Teach you new software/hardware that you'll need to use in documenting the subject matter
- Create or shape content or learning objectives
- Develop course or documentation technical content
- Provide you with screenshots and other materials
- Give you access to data and systems
- Review content for accuracy and quality
- Provide valuable feedback

# Why Are SMEs a Challenge?

- Smart
- Limited on time
- Have lots of other responsibilities and projects
- Required to deal with you as part of their job
- They have an expectation as to how you will do your job but they may or may not have ownership

# What Kind of SME Do You Need?

- **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.
- **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.
- **How much time will your SME be able to devote to you?** If time is an issue, you might want to figure out what you need and figure out how to divide up what you need so that several people can get it for you instead of relying solely on one person who has a lot of other responsibilities.

# Common Challenges You'll Face

- **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 in. 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.
- **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.
- **Because It Took So Long for Them to Learn It, 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. It is also a challenge for you 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. You have to trust your instincts but do listen to what they consider to be important knowledge to cover. You may just not cover it in the depth they feel is needed.

# Tips for Engaging with SMEs

- **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 people who are part of the project in a meeting room with few distractions. Show them that you respect their time by treating it as a valuable commodity.

- **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 as comprehensive a list 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.

# Tips for Engaging with SMEs

- **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 SMEs 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.

*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! Listen, ask 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.*



# Tips for Engaging with SMEs

- **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.” 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?

- **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. If you’re ever at a loss, ask them what they do first, and then what happens next, and so on... Ask about inputs, outputs, and what happens in the middle. While my questions aren’t that basic, at the end of the day, that’s what I’m asking about until I eventually learn complete processes and systems.

# Tips for Engaging with SMEs

- **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 if it is done in person. 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.

- Later, listen without being stressed out about taking accurate notes, knowing that everything said and shown will all be captured and then download and use the recording to create documentation or training script.

In many cases, I don't even need access to the software they're talking about because they've shown me the screens and I can use them to take screenshots. So I can sometimes save the company 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.

# Tips for Engaging with SMEs

- **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, 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.

- **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.

# Tips for Engaging with SMEs

- **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.

- **If/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? I've been known to bake their favorite chocolate treat to bribe them to spend an hour or two at least doing a cursory review of my content. It can help if I have specific areas that I can point to where they can focus their attention.

# Tips for Engaging with SMEs

- **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 them 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 documented so they can easily understand what you want and why.

- **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.

# SME Personality Types

In the next few slides, we'll meet the four personality types that make up the typical type of SMEs you're likely to come across and we'll give you tips on how to approach each one for the best relationship results:

- Percy the Project Manager
- Dave the Developer
- Rachel the Rabbit Holer

**Note:** These personality types are only meant to be humorous but there is truth to the overall behaviors.

# Percy the Project Manager



## Characteristics:

- Not technical (doesn't code but has a high-level grasp of systems)
- Very detail-oriented in a know-it-all kind of way
- Likes to maintain control by booking meetings and inviting you to them.
- Likes to tell you who to get information from and what kind of information you can ask them for.
- Likes to run meetings even when they are set up for you to get info
- Holds onto data instead of posting it onto the SharePoint and likes you to have to ask for it.

# Percy the Project Manager



Percy has the idea that he can run the company on his own and knows better than leadership. He is a Monday-morning quarterback who will never get in the game but likes to waste company time talking to you and anyone else about his ideas for why the stock went down, the economy tanked, or why something else didn't work. He knows why/how it could have been done better if he'd been in charge.



# Best Ways to Work with Percy



- Offer to schedule meetings
- Set an agenda for the meeting or at least for your part of it
- Take notes on meetings and distribute them so you'll have the ownership of them and won't need to wait for him to send them to you.
- Create a SharePoint site, post project materials, and send links out to him, forcing him to use them to post project updates.

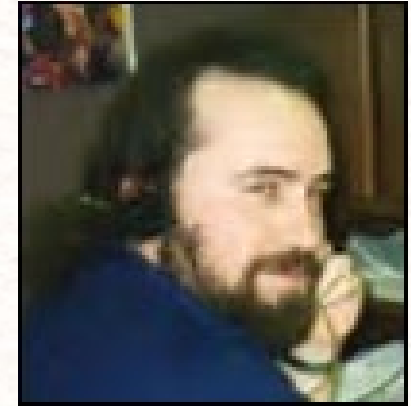
# Best Ways to Work with Percy



- Leave meetings as soon as they are over so you aren't able to allow him to take up your time talking about his agenda.

*(You don't want to be rude or unfriendly so you maintain a good working relationship, but you want to make sure he isn't pulling you into conversations you aren't interested in and that are time suckers. Percy is a time sucker who will talk about how busy he is after talking everyone else's time away. )*

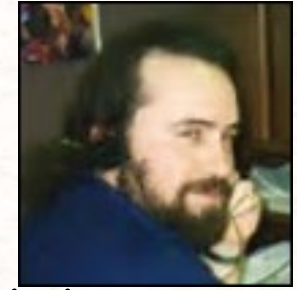
# Meet Dave the Developer



## Characteristics:

- Very busy – in lots of meetings and has products to deliver
- Responsible for multiple project deliverables
- Has other writers and instructional designers on projects that all want information and want to take time away from all he wants to do which is to code.
- Knows his code inside and out
- Can tell you how his systems work together
- Very technical speaking – has trouble speaking layman's English

# Best Ways to Work with Dave



*Dave's biggest fear is that he will have to spend his valuable time training you on basics before you can start doing your job.*

- Appear to be organized, technical, and knowledgeable
- Respect his time and don't waste it with questions that someone else can answer
- Get your preliminary knowledge from others before you engage him
- Schedule hour-long meetings and record them
- Have notes of the questions and areas you want to cover
- Ask him for other documentation and resources
- Ask him for a rough drawing of systems or processes
- Do not keep coming back with individual questions or you will ding him to death

# Meet Rachel the Rabbit Holer



## Characteristics:

- Likely came up through the ranks and has been responsible for data
- Very detail-oriented
- Process-oriented (not a coder)
- Tends to over-explain every procedure
- Cannot get from point A to point B without going off track
- Any session you schedule with her will take twice as long and you will only get about 60% of what you'd planned.

Rachel is the kind of person who, upon asking for directions from 1<sup>st</sup> Avenue to the Space Needle, will provide directions that include a stop off at her favorite watering hole and another stop off for Tapas.

# Best Ways to Work with Rachel



- Respect her value as a vault of knowledge of processes
- Watch for the moment when she veers off the core process by trying to show you short cuts. That's the sign that she is starting to rabbit hole.
- Ask her direct questions about what happens first, and then second, and so on...
- Ask her what the inputs to to each step are and if the inputs were something that she had to do or who is responsible and go step-by-step.
- Do not ask open-ended questions.

# Best Ways to Work with Rachel



- The more you can get her to think about a core process or procedure, the better your overall experience will be. You will find that she might not even start with step 1 so you might have to ask her several times about the first step. She might start with step 1 of day 75... She's tricky like that.
- Watch out for her to start actually training you instead of answering questions. She will want to talk but isn't really present to what she's talking about. She's on automatic because she is so comfortable with process and procedure. You have to stay present to keep her from starting to go into automatic mode and get her to answer just the questions you ask.

Questions?

**Thanks for attending!**

**You can reach me at [Lin@LinLaurie.com](mailto:Lin@LinLaurie.com).**

**Also check out my website at [www.linlaurie.com](http://www.linlaurie.com)**