WORKING WITH SMES

**module
03**

WORKING WITH THE SUPER 6

how to work with SMEs with *different* work styles.

Try these tips to help you work with even the most challenging subject matter experts (and clients too).

The MIA SME

They say:
Well, nothing... because they've ghosted you.

You say:
"Hello, the deadline for this review is Friday. I will take a lack of response as confirmation all is accurate.

What you can do:
- Help them understand the process and why collaboration, not just hand off, is critical.
- Give them specific tasks to complete by specific dates. Always put the date in writing, and follow up if the date is missed by 24 hours.
- Send automated reminder emails 24 hours before due dates.
- Contact their manager, if necessary.

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The "Yes" ME

They say:
"Whatever you think is best."

You say:
Thanks for your trust in me. I really do need you input though. I'm not an expert in this subject, so I could really use your perspective to ensure everything is accurate and relevant.

What you can do:
- Education is key. Help them understand the risks of failing to participate as a subject matter expert.
- Ask them very specific questions during interviews (e.g., what is required to do XYZ?).
- Use the comment function to prompt them to provide feedback (e.g., hey there, I'm not so sure about this sentence. Can you provide a link to a resource that would show it's accurate.

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The Unfocused SME

They say:
"Hey, what if make this scenario VR? And maybe we can add a lesson about this other cool stuff. Also, did you watch that last Game of Thrones episode? I just need to check a few emails while you go through that document. Is that cool?"

You say:
Those are all great ideas. We really need to focus on this if we're going to make our deadline, but why don't you jot those ideas down so you don't lose them. Let's spend the next 20 minutes really focused, and then we can take an email break. We're really making progress here, and I'd hate to lose momentum.

What you can do:
- Constantly circle back to the outlined goals.
- Point out constraints, like budget and time.
- Have them do an activity - like writing about a specific prompt, rather than just talking through things.
- Use the comment function to point to specific areas of content that require feedback.

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The Dictator

They say:
"I've been doing this for a long time, and this is how it needs to be done."

You say:
I am glad you're a part of this project. Your expertise is so valuable! Allow me to explain to your the educational theory/organizational theory behind this decision. I really think with the knowledge you've shared and these small changes, this program could be more effective than ever before. In fact, we could see [impact / result] in just as little as [time frame].

What you can do:
- Remember that people are usually headstrong not because they're jerks, but because they're passionate. This SME wants to do a good job.
- Build trust by showing you're an expert. Go in with facts, stats, and theories. As a Dictator learns you are capable, they often relax their need for control.
- Try 3 counterpoints. Many times, if you can make three counterpoints to a Dictator's argument, they'll concede.
- Focus on ROI.
- **Never take abuse.** There's a difference between someone who wants creative control and someone who is abusive. If your SME is the latter, report them. Refuse to work with them. It's your right to have a safe work environment.

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The Info Clinger

They say:
"It's all important!

You can say:
Absolutely! And I know we want to help our learners succeed. It's really hard to remember everything you learn in formal training, so our goal is to emphasize the things that will enable them to meet the learning goal. We can always provide additional information in other ways, so that they can further their learning after the training event.

What you can do:
- Write out the course goals for them.
- Ask for specific details rather than large overviews.

The One You Want to Work With

They say:
"How can I be most helpful?"

What you can do:
- Lay out a plan.
- Follow through on deadlines from your end.
- Praise them for a job well done.
- Listen and support them when they struggle.

A FEW MORE PRO TIPS

things you can do with any SME to work well.

Always be solutions oriented.

Most people are saying "no" because they can't imagine what you're trying to show them yet. Bring solutions when you have objections. Better yet, show them with a micro-prototype or example.

Resist passing judgment.

Regardless of how your SME thinks about the learners and the learning context, you must refrain from passing judgment or making remarks about their personality. Sometimes, they're overwhelmed with work, and this is one more thing slapped on their plate. Sometimes, they're worried they will lose their job once you create training. Lead from a place of empathy, and remind them that it's a collaborative effort.

Be willing to educate them on process.

Remember, most SMEs have never worked with an instructional designer before. Help them understand how you can best collaborate. Share your processes and expectations and the things in which you carry expertise.

Focus on performance.

Keep the conversation focused on performance. Show them the difference between giving information versus helping people achieve goals. It's ok to push back. Expect to explain why your proposed alternative is a better solution.

EVEN MORE PRO TIPS

Establish rapport by...

- Asking communication preferences

- Allowing SMEs to introduce themselves and discuss their expertise

- Helping SMEs understand how you can best collaborate - how do you like to work? What have you found effective?

- Providing a process map

- Keeping personal things private - as you build trust SMEs may confide in you, don't gossip.

Create a positive interview environment by...

- Recording your interviews so you can spend more time listening and less time worrying about note taking

- Always asking permission to record

- Going in prepared and organized / being respectful of their time - have questions, notes, research done

- Balancing open ended questions with yes/no

OTHER COMMON OBJECTIONS

respond to SMEs and other stakeholders.

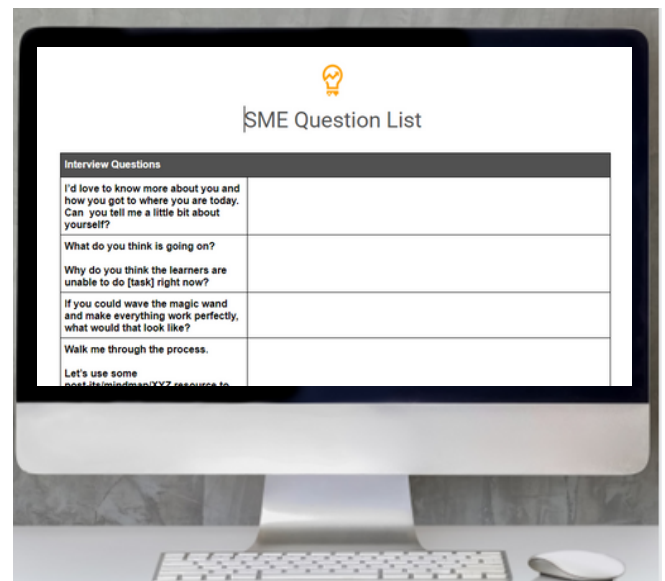|	
They definitely need a course.	I'd like to help you create a solution, and while I love creating training, I just don't think it's going to solve your problem. I think we could create X and Y instead to support learning and performance. How would you feel about that?
The learners just don't care, honestly. They're never going to do this.	Is there a way I could talk to the learners to assess why they're not motivated to learn [task]? I've found in the past that sometimes, when it seems like people don't want to do something, it's because they're scared or overwhelmed.
Some people just don't get it no matter how hard you try.	Let's think about the target learner here and how we can scaffold the content to make it so that folks who are starting from behind can catch up without slowing down the more advanced students.
They should already know this.	That's probably true, but if we focus on what "should be" instead of "what is," we won't be able to get people where we want them to be.

SME
QUESTION LIST

get your questions answered with the SME Question list.

Get what you need and show you're on top of it.

You can learn so much from your SMEs. Knowing they're basically a human encyclopedia on the topic, figuring out where to start can feel overwhelming.

Use the SME Question List to help navigate early conversations. Remember, you'll need to add your own content-specific questions.

Create your own copy here.

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