

The SME Equation

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Have you ever had a deadline looming and wondered if your subject matter expert (SME) had left the planet? Have you requested information and found that what you received from the SME wasn't at all what you needed? Have you found yourself face-to-face with a SME who feels they know more about training design than you do?

"There's nothing more frustrating than getting into a project only to discover that you and your SME seem to be working from different playbooks."

If you design training programs and rely on SMEs to provide you with content, it can be a challenge to create a partnership that works. To help training designers, we created the SME equation. It may hold some insight into how to improve your success.

Preparation (Communication + feedback) = Results
Preparation

There's nothing more frustrating than getting into a project only to discover that you and your SME seem to be working from different playbooks. Here's a quick checklist of things you need to discuss with a SME at the start of a design project:

Roles:

Determine what you will do and what the SME is expected to do. Avoid stepping on each other's toes.

Contact methods:

Decide how you will communicate with each other (email, phone, meetings) along with how quickly you will respond to each other's requests.

Deadlines:

Create milestones throughout the design project and set a final deadline that still gives you time for the unexpected.

Content:

Discuss how content will be submitted. Do you want it embedded in an email or sent as attachments? Will the SME select relevant content or will you be expected to scan documents for the content you need?

Communication

It wouldn't be surprising if you and the SME have different communication styles. After all, you bring different skills to the table. Study how the SME likes to communicate and mirror that style if possible. Go out of your way to be clear on your instructions. If you find that your requests are being misunderstood, you may want to change your communication method (i.e. from email to phone). Most importantly, be sure to acknowledge the contributions of the SME so that he or she knows that you appreciate your work.

