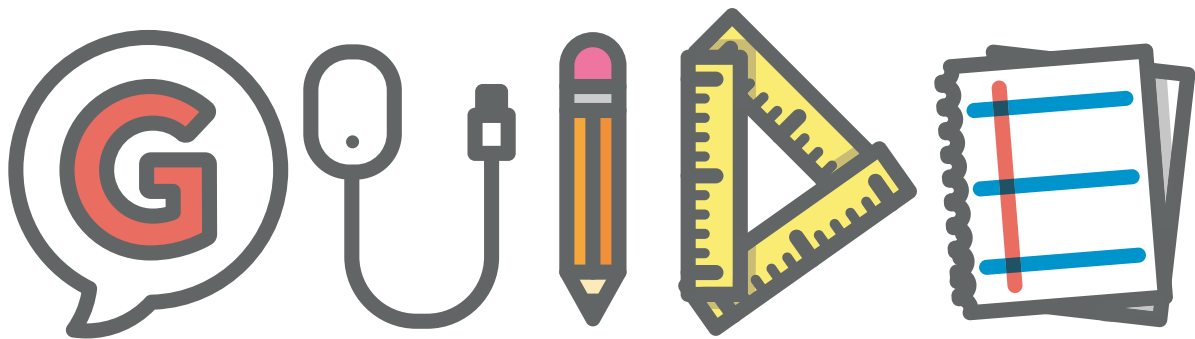


**THE
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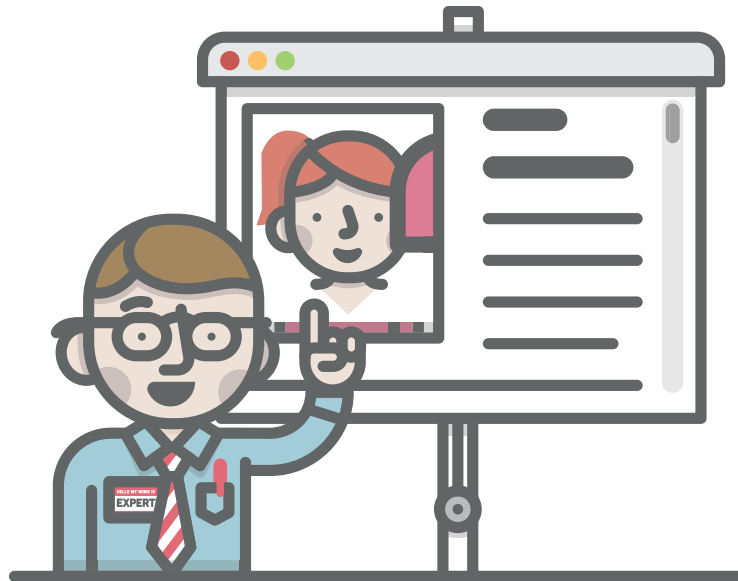


**TO WORKING
WITH SUBJECT
MATTER
EXPERTS**

Table of Contents

Subject Matter Experts and You	3
How to Set the Right Tone for Your SME Relationship	5
How to Get the Right Content for Your Course	9
How to Set Expectations for the Course	12
How to Avoid SME Attachment to Existing Content	14
How to Keep Projects Moving	17
How to Wrap Things Up	21
Don't Wait to Give Your SME Relationships TLC	22

Subject Matter Experts and You



Subject matter experts (SMEs) are just that: experts in their fields. Their brains are packed full of the content, experience, and insights your learners need to do their jobs better. They've invested a lot of time in developing their expertise and have a nuanced understanding that goes far beyond just the facts. And they play a critical role in e-learning development. SMEs help you craft learning objectives, create content, and provide valuable feedback. In short, you can't develop effective e-learning without their input.

But getting what you need from SMEs isn't always easy. For example, they're often so far removed from the learning process that they may

have a hard time zeroing in on what information the learner really needs to learn new skills. And because SMEs are busy, your projects can stall if they're not fully engaged.

In this e-book, we'll explore how to work with SMEs effectively so you get the information, involvement, and feedback you need to meet project timelines and create great e-learning.

How to Set the Right Tone for Your SME Relationship



It pays to build a positive relationship with the SMEs on your project from the start. When you're respectful and appreciative, they'll want to help you. When you communicate in a clear, concise way, you pave the way for even smoother projects in the future. To build positive SME relationships, keep in mind the following guidelines.

Be Prepared

Before you even meet, do your homework. Collect as much information as you can and take time to digest it. Your goal is to get a basic understanding of the SME's world and the context for your course. Plus, when you're prepared, you show SMEs that you value their time.



After you do your research, prepare a list of questions to help guide your conversation. You can't go wrong with the standard “who, what, where, when, and why” prompts. Having questions on hand will help you stay on point.

Communicate Clearly and Respectfully



Communication can make or break your projects. And the cornerstone of good communication is respect. Show your SME that you respect her knowledge, perspective, and input by being an active listener. If she

knows you're truly interested in her input, you'll win an ally and learn a lot, too.

Also, remember that we don't always clearly say what we mean, and what we say isn't always what people hear. A good rule of thumb is to repeat what you've discussed with your SME in writing: "Per our discussion today, I understand that" It takes just a few minutes to write an email that reiterates your understanding, and by doing so you'll be able to identify and correct misunderstandings before they derail the project.

Align Expectations



Get on the same page with your SME from the start by crafting a course development agreement. You can use the agreement to define deliverables, timelines, project scope and constraints, reviewers, and measurements of success. By putting project details on paper, you'll

effectively align your expectations and your SME's expectations.

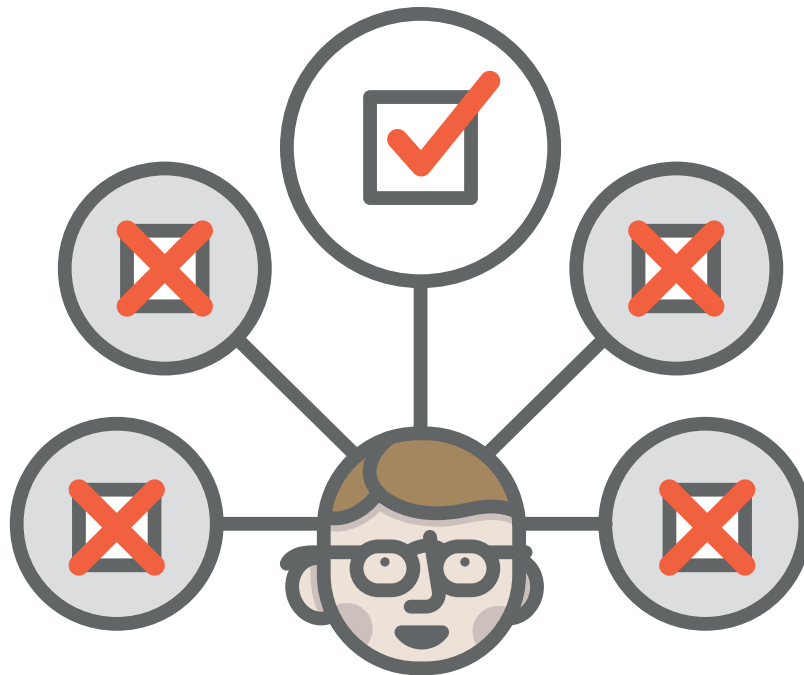
[Download a sample course development agreement.](#)



Show Your Appreciation

Everyone likes to be encouraged and affirmed. Tell SMEs often that you value their contributions. Better yet, email their managers throughout the project, praising their input and expressing your appreciation. This not only serves you well on the project, it will pay dividends later if you need more of their time.

How to Get the Right Content for Your Course



As an expert, your SME has all the knowledge and experience you need to build your course—and then some. The thing is, learners don't need to know everything the SME knows.

But sometimes SMEs consider all information critical, and won't agree to excise even superfluous details. You can avoid this frustrating dynamic by changing the way you (and your SME) think about course content.

Focus on Action, Not Information



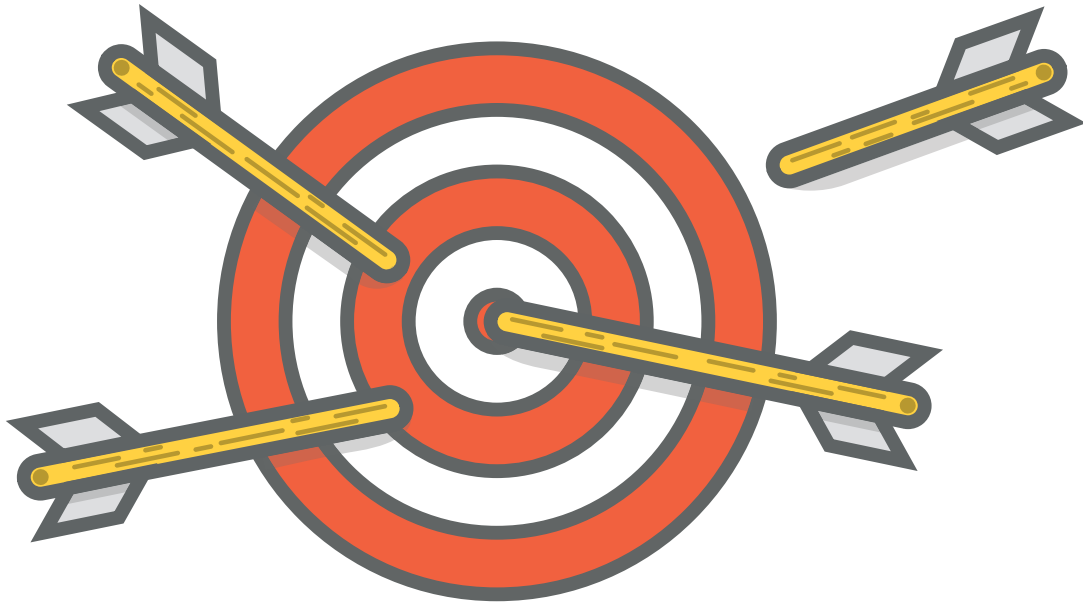
Your learners just need content that will help them do their jobs or take certain actions. In other words, if the information doesn't help learners take action, leave it out.

Sit down with your SME and outline what actions learners should be able to take after completing the course, then let that information frame what content you need. You can even build an elevator pitch to help you stay on track. It might go something like this: “This course will help [learner’s role] learn how to [actions].” Share this pitch with the SME, and come back to it as needed to remind both of you what information is relevant.

Once you figure out how learners will use information, it’s much easier to see what type of content will best serve them. For example, if you’re teaching a policy, ask your SME to provide a real-world situation or case study where the policy applies. In your course, you can walk learners

through the scenario and have them make decisions and get feedback on how they apply the policy.

How to Set Expectations for the Course



SMEs aren't experts in learning theory. What they understand about e-learning probably comes from their own experiences. So don't be surprised if your SME expects your course to look and feel like all the other e-learning courses they've taken. That probably means a basic click-and-read course that's heavy on information, light on interaction.

Luckily for you, it probably won't be hard to change your SME's expectations. After all, most people don't really like click-and-read e-learning; they just don't know there's an alternative. It's up to you to expose your SMEs to the possibilities.

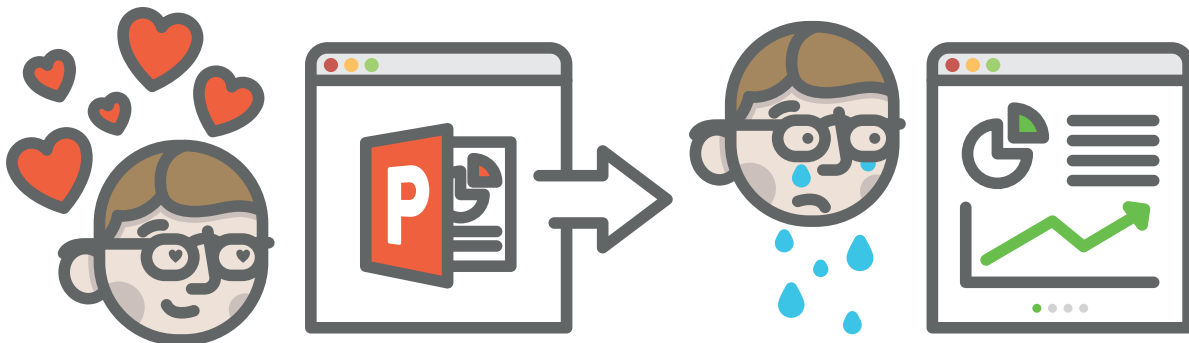
Show Compelling Examples



Think about what type of course will best help your learners, and then show a few examples of similar courses to your SME. A good rule of thumb is to present three treatments that help them understand your vision. Focus on a few slides in your examples and explain how the interactions on those slides work.

You want your SME to focus less on the information, and more on how interactions make information meaningful and relevant to the learner. Instead of showing multimedia bells and whistles, demonstrate how each type of interaction helps learners digest and “own” information.

How to Avoid SME Attachment to Existing Content



You've built a learner-centric, interactive course that meets your course goals. Awesome! But then you send the course to your SME for review and he balks because it looks nothing like his PowerPoint. Here's what you can do to help your SME feel less attached to his content.

Don't Talk About Your Authoring Tool

Remember, your SME might have invested a significant amount of time building that PowerPoint presentation for classroom-based training. He probably spent hours finding the perfect clip art, fonts, and templates. And if he knows you're authoring in PowerPoint using a tool such as Articulate Presenter, he might expect you to use his clip art, fonts, and templates.



To avoid this situation, don't advertise what tools you're using to create the course. Your SME doesn't need to know. What really matters is that your course meets the organization's goals.

Tell SMEs They Can Give You Any Type of Content



You don't want SMEs to think that you're just adding sparkle to their presentations to create e-learning. You're creating something wholly new. You can help reinforce this idea by making a point to tell SMEs that you're building the course using content from all sorts of sources

in many formats. Let them know that they're free to give you content in any format. If they provide a PowerPoint presentation, you can include a note with your thanks that goes something like this: "This has some great content I can pull out for our course."

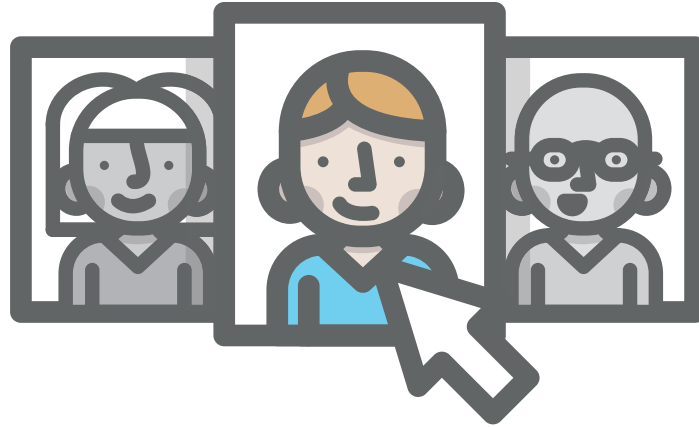
How to Keep Projects Moving



When asked what most delays their projects, many course designers cite working with SMEs as their number one obstacle. It's no wonder, since your course depends so much on their experience, context, and content. That's why it's so important to establish a smooth production process with SMEs. There are several things you can do to pave the way.

Identify a Primary Stakeholder

It's likely that many of your projects will include multiple stakeholders and SMEs. Someone needs to be the final decision maker so that the project doesn't get bottlenecked by conflicting comments and circular review cycles. Get all stakeholders to agree on who will serve as the primary stakeholder— and final arbiter of conflicting comments. To get help managing reviewers, download this [handy list of reviewers](#) and read this [Who Should Review Your E-Learning Course Before Launch?](#) article.



Clearly Communicate Timelines, Action Items, and Expectations

In addition to setting up a [course development agreement](#) at the beginning of your project, you'll want to proactively communicate timelines, action items, and expectations throughout the project.



When you send your course to SMEs for review, be sure to preface it with relevant information, such as:

- **Description of the kind of feedback you need.** For example, you might indicate that you'd like them to review the content for accuracy and relevance only.
- **Action items and due dates for both you and the SME.**
Communicating what you need your SMEs to do, and what you will do, helps clarify who is doing what—and how they're connected. And don't be afraid to reiterate timelines and action items. If you've discussed changes verbally, follow up with an email detailing the new plan.



Praise Your SMEs

We covered this earlier, but it bears repeating: be sure to express your appreciation not only to your SMEs but to their managers, too. When you let people know that you value their contributions, they're more likely to provide the help you need. And don't wait to praise them until the end of the project. Throughout the project keep up a stream of positive communication, and send glowing emails to their managers when you receive valuable content, feedback, or cooperation. Make them look good and you'll earn a willing partner now—and on future projects.

How to Wrap Things Up

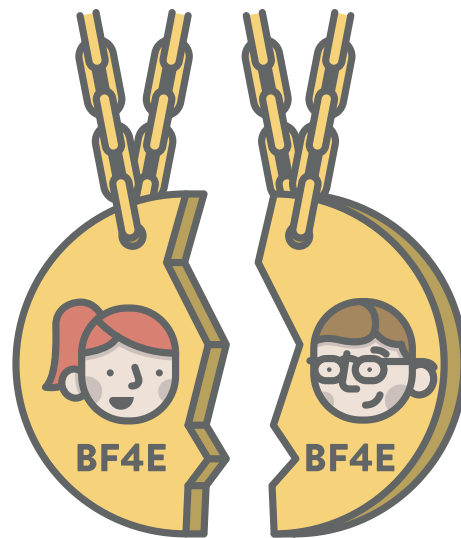


You've delivered the final course. Now what? You'll want to discuss what happens next with your SMEs. By explicitly communicating how you'll end the project, you'll avoid misunderstandings later.

Things to discuss include:

- Who will measure the course's success
- How and when it will be measured
- Whether you and your SMEs will meet to evaluate the course's success
- Whether you will make adjustments to the course based on analysis of the course's success
- When you will make these adjustments

Don't Wait to Give Your SME Relationships TLC



Imagine working with SMEs who are in perfect sync with your needs. Who happily provide the content and feedback you need in a timely matter. Who facilitate, rather than tangle up your project progress.

Sound like a distant utopia? It doesn't have to be. If you give your SME relationships some of the TLC we've outlined in this e-book, you just might be surprised at how much faster and more smoothly your projects unfold.

For more information on managing projects, check out the [9 Steps to Better E-Learning Project Management](#) e-book.

If you enjoyed this guide, please feel free to link to it from your own site or [share this link](#) on social networks.

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