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Phase 1: Project Initiation

Tips for Working with SMEs

Subject matter experts play a critical role when developing course content.

They help craft the learning objectives, create content, review it for accuracy, and provide valuable feedback. Because of this, you'll want to develop a respectful working relationship. SMEs are partners in the organization's success. By following these tips, you'll build a good relationship and shape the perspective to build effective and meaningful courses.

Do your homework.

Spend some time researching and reading up on the topic before meeting with the SME. This will gain you respect, increase your credibility, and save the SME time in walking you through basic information.

Clear communication is central to your project's success.

What we say and what we mean are not always the same. It is important to establish very clear objectives and expectations when working with SMEs. Bring them in on the projects early, stay on top of project milestones, and make sure you are proactive in communicating with the SME. If you expect some feedback from the SME, make sure you explain what you need and when you need it.

Ask the right questions.

If you ask the SME, "Does the learner need to know this?" the answer will most often be "Yes!" Instead, try asking questions like these:

- "Can you give me an example of when the learner would use this information?
- "How often does that happen?"
- "What is the consequence if the learner doesn't know this/perform this?"

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Establish expectations before it's too late.

If you have tight deadlines and specific goals, let your SME in on the secret. Establishing expectations at the beginning of the project ensures that the subject matter expert is on board with scheduling and knows exactly what is expected of him or her. This helps avoid confused communication and missed deadlines.

Remember, the SME already has a job.

Subject matter experts are typically very busy people, so you'll need to be respectful of schedules. Work around your SME's current obligations and you'll be working with a more willing participant. It might stretch your deadlines, but the information is the most important portion of your program.

Pay attention to the relationship.

The SME has information that you need, so work to cultivate a friendly, mutually respectful relationship. Be a good listener and learn from your SME. Active listening is a sign of respect. If your SME knows that you are truly interested in his or her input, you'll win an ally. Be respectful. Appeal to their sense of expertise. And for goodness' sake, say, "Thank you."

What's in it for SMEs?

Many SMEs enjoy the opportunity to engage in the creative process with instructional designers, and take pride in the end result. They are validated as experts, and their efforts help their organization and their fellow team members become more successful.

A large part of your project's success hinges on the relationship you have with subject matter experts. They play a key role by providing guidance, expertise, and context for much of your course's content. Follow these tips to make things easier for your SMEs, whose feedback will make things easier for you when creating course deliverables.