Working with Subject Matter Experts (SME’s)

Module 3 – Train the Trainer

Do you work with subject matter experts (SME’s)? This lesson will reveal the secrets to translating their knowledge into instructional content. You’ll learn how to arrange logistics, outline content, and deliver the project to the SME’s and audience’s satisfaction, while keeping the content factually correct and interesting.

Session Objectives

At the end of this lesson, you will be able to:

- Define a SME
- Explain how designers and SMEs interact
- Determine scope of work
- Build a schedule
- Outline the content
- Manage deliverables
- Retain the SME’s voice
- Incorporate feedback
- Launch the content
Working with a Subject Matter Expert (SME’s)

What is a SME?
Subject Matter Experts, or SME’s for short, are experts who have domain knowledge, authority, and credibility in a specialty or field. They know their work inside and out.

Three Attributes of SME’s
Regardless of their field, a SME generally has three attributes:

1. Years of experience in a field or occupation
2. Information to share, which is commonly called content
3. A level of thought leadership within their sphere of influence

Notice from the list, teaching ability. While some SME’s are also natural teachers with a knack for educating others, SMEs don't automatically know how best to convey what they know. They know how best to do what they do. That’s where instructional designers come in. We work with SME’s to learn enough about the domain and expertise to create compelling education in their voice, helping them multiply their influence. Our success in partnering with them depends on the relationship we build and the care we take with our content.

Interacting with SME’s
There are essentially two categories of relationships you will have with a SME. They are:

1) Instructional Designer as a service provider to the SME client – In this case you would work with the SME to produce a product such as online training or some type of document.

2) Instructional Designer as a project manager to the SME stakeholder. In this scenario you would be working with a SME or a group of SME’s to build a training tool that helps the SME’s accomplish some type of goal.

Building the Relationship with the SME
Regardless of the role that you’ll be playing with the SME’s it’s important that you build a relationship with the SME.

1) Build a relationship. Take time to get to know each other and develop trust and rapport. This can be as simple as sitting down face to face for small talk or as elaborate as a two hour working lunch to discuss the project.

There are several questions you can ask yourself to test the relationship strength:

- Do you know what the SME does for work?
- What (s)he does outside of work for fun?
- Significant other’s name?
- Whether or not (s)he has kids or pets?
- What’s important about the content and about your SME’s career?
- How do they prefer to communicate work with you?
2) Honor their content. Regardless of whether you’re building instructional content for clerks, project managers, doctors, or educators, the most important thing is preserving the voice and tone of the field and the SME. Their content in your words is powerful, but their content in their words has a ring of authenticity. That’s not to say you won’t be able to polish and refine, but create a safe place for you to mutually explore and shape the content together. That way, there’s trust that the content will be in good hands and treated with respect.

3) Recognize that you can do more together. A great piece of content with a passionate SME but no instructional design won’t go very far in educating others. It takes both skill sets…domain knowledge and teaching knowledge to educate others with the content.

Get to Know the SME
Candor and communication is a benchmark of the health and strength of a relationship. SME interactions are no different. First you build a relationship, then you build your communication skills, and over time you’re rewarded with trust. It’s worth the time investment to get to know your SME and his or her work so you can build that foundation from day one.

1) Research your SME
It’s always a good idea to do some research on your SME before you even have your first meeting with them. Tools you can use are already at your fingertips. Does your SME have a webpage? Does the SME have a social media presence?

Use the following suggested SME Research form to help you gather information about your SME. Things that you are looking for include: background information, different resources that they may have posted or have access to, how (s)he likes to interact with their audiences, things that are meaningful to them, history, and expertise.
SME Research Template

Basic Information
SME Name:

Goes by:

Contact Address:

Phone:

Preferred mode of contact;

Accessibility (high or low):

Bio:

Expertise
Occupation:

Experience (years of work, special projects, etc.):

Website:

Teaching positions (and where):

Link to published articles/works:

Books:

Videos:

Social media links (Twitter, LinkedIn, Facebook, blog):

Preferences, specialties, distinctions:

Motivation for doing work:

Content Information
Central ideas or concepts:

Target audience:

Preferences or biases:

Future directions of content:

Words to summarize their focal point and priorities:

Areas of clarification or concern:
Establishing the Relationship

Once you feel prepared, it's time to set up that first call meeting with your SME so you can kick off the project. This is where you'll set the tone for the relationship, and learn more about your SME. By the end of it you should have a complete project scope of work document so you're both clear on what you're doing. A scope of work document can help you and the SME define the parameters of the project so it can reach successful completion.

When you have this meeting:
- Show up early
- Be prepared
- Be an active listener
- Ask lots of questions

For the initial meeting it's probably a good idea to set the meeting to last about an hour. Regardless of the time you take, figure that you will spend about a third of it getting to know each other's work and establishing the relationship; a third focused on the project vision, and the final third setting up your schedule. Certainly, adjust the timing to depend upon the complexity of the project and your schedule.

Do concentrate on developing the relationship. Diving right into work is a recipe for a stiff, detached relationship that makes it harder for you to work together. Look for a connection point or a place where you and the SME can connect on something outside the project. The main goal is to find a connection that sets you up for a go to non-work pleasantries that you can rely on through the course of your relationship. Over time you'll build this set of connection points to be robust and deeper than they are on this first call. But it's your job to set the stage to be comfortable with each other. Once you've broken the ice, be ready with some standard questions you can ask to start the relationship on the right foot.

Some initial questions to ask:
- What drew you to this field?
- What's most important to you about how you teach the topic?
- If there is one message you want to leave in people's minds, what is it?

Let the SME talk --- you listen!
Instructional Design Project Kickoff – Scope of Work

Instructional Designer:

SME:

Kickoff call date and time:

Contact details:

Phase 1: Establishing the Relationship
In the first part of the call you want to establish your working relationship and apply the great information you’ve already researched about your SME. This portion of the call might take 10-20 minutes depending on total call length.

1. What drew you to this field?
2. What’s most important to you about how you teach this topic?
3. If there’s one think your message should leave in people's minds, what is it?
4. Notes about SME speech patterns, interests, etc.:

Phase 2: Setting up a Shared Vision
In this second part of the call, you want to establish the scope and vision for your project. This portion of the call might take 10-20 minutes depending on total call length.

1. Who is the audience?
2. What does the audience need?
3. Will the final product be a manual, an elearning course, a video course, a training guide, or something else?
4. What topics will it cover?
5. How long will it be?
6. How do you reach your audience? (Register for classes, obtain handouts, etc.)
7. How do you plan on handing administrative details? (Getting instructors, attendance, rooms, etc.)

Notes about the project specifications:
Housekeeping Details

1. Communication method (Phone, Video Chat, Email, Text, In-person, etc.)?

2. How do you like to give feedback to me, and how do you like to receive feedback from me?

3. SME availability and yours (are you fully devoted to this project, both juggling this and others, etc.)

4. Big events on your calendars (Is there anything coming up in your schedule or personal life that might impact the project? If so, how can we plan around it?)

5. An open understanding of budget if it’s a part of your project—getting a sense for what the availability is even if you aren’t finalizing.

Phase 3: Building a Schedule

In this final part of the call, you want to establish the schedule you’ll keep. This portion of the call might take 10 – 20 minutes depending on the total call length.

1. Project completion date:

2. Project Start Date:

3. Project task list:

4. Project milestone list:

5. Sequenced schedule:

6. Accountability notes:
Setting a Shared Vision
The next part of your call is when you shift to project mode, talking about the specifics of what you’ll co-create. Some of the project details might be ones you dictate and others might be ones the SME weights in on. So the key is a collaborative conversation to agree on outcomes and establish your ground rules.

You’ll want to nail down:
- Who your audience is
- What does the audience need
- What will the final product look like? (e.g. manual, e-learning, etc.)
- What topics will be covered?
- How long will it be?

Each of these questions is going to take a little bit of conversation to answer. So give yourself space to talk through the pros and cons of the different methods/tools you could build the training in, or the ways a manual might get put together. You’ll obviously share your guidance and best practices here, while your SME will likely talk more about what the content would benefit from in their minds.

You’ll also want to establish some housekeeping details in this part of the call such as the preferred communication preference, how you like to give and receive feedback, yours and your SME’s availability, and if there are any budget or technical concerns. You don’t have to finalize it right now.

Building a Schedule
Building a project schedule is one of the most important goals of your phone call as the schedule determines whether you go somewhere quickly or nowhere slowly. Use the following four step process to make scheduling painless:

1. Determine the final date and working backwards to determine how long you have to complete your project, and what your start date will be.

2. Work out the major tasks that need to be accomplished and how long they take by listing our every step in detail. Be sure to put an estimated time to accomplish each task next to that specific task.

3. Build a schedule breakdown with your SME that includes dates and deliverables. You and your SME should clarify:
   - What is due (document, feedback, meeting, etc.)
   - Who it is due by (you, the SME, or some other resource)
   - When it is due (a hard date and time)

4. Establish agreement on accountability. Discuss what measures you’ll agree to take for a late work or delays. Does missing a milestone have significant impact upon other parts of the timeline? Identify the most critical pieces that HAVE to get done so the project doesn’t completely fail.

The hardest part of the project usually is the accountability aspect. By establishing accountability guidelines, it’s helpful to set everyone involved with the project up for success by being extremely organized. You can pop reminders on people’s calendars for due dates or send project recap emails so everyone is clear on what’s coming when.
Think of yourself as the leader. It's your job to facilitate other doing theirs, so when in doubt, make sure you're finding out the best way to communicate deadlines and schedule priorities to each person your project affects. By the end of the first meeting, you and your SME should have a clear scope of work document for the project. It should include scope details, what I know now about any budget or technical needs, and a timeline. You should share the Scope of Work document with your SME for signoff.

**Outlining the Content**
Outlining the content is the part of the instructional design that becomes the clay you and your SME fashion into meaningful education. There are three ways that you can start this process:

1) The SME outlines the content from their material, then the instructional designer and SME edit it together

2) The instructional designer outlines the content from background material, the SME provides additional materials, and then together you both edit it

3) The instructional designer interviews the SME and develops an outline on the fly as you both are talking. You both then edit it at the end.

**First Approach: SME Outlines the Content from Their Material**
This first approach is where the SME does the first pass outline of the content and then the instructional designer takes a look to check if it’s instructionally sound, whether it makes sense for the audience, and if there are any glaring holes or issues.

Approach works for:
- Seasoned SME’s who can practically outline content in their sleep
- SME’s who also have natural teaching ability
- Those who have a lot of time for the project
- Those who like to be intimately involved in how their content is translated.

Approach does not work for:
- Busy SME’s
- Those who are less interested in the project as a whole
- SME’s who are working with you because they want to do less work
- SME’s who are new to teaching or translating their content

What you’ll review for in this approach:
1) Flow and authenticity
   - Does the original content teach you the topic?
   - Are the big topics there and do you see the kinds of words or terms that you would expect?
   - Does it match the 70% test? In other words, is the outline content around 70% of what you’d expect to be there at the level it needs to be at? (Does the content look right or not?)
2) Content Chronology
   o If you read these outline titles one after the other in sequence does the story start to appear, does that story make sense?

3) Fact Finding and what we are missing
   o What’s not there/
   o What did I expect and not get?
   o Any gaps or opportunities?

Frame outline feedback in question form rather than imperative form to protect the relationship you’ve established with your SME.

Second Approach: Instructional Designer Outlines the Content from Background Materials and SME

This approach is where the instructional designer takes a first pass at outline the content with the SME looking over the work to check for factual correctness, ordering, and any missed points. This approach is where the SME appreciates your initiative and can then fact check and tweak your work, usually with minimal changes. You will need full access to the SME’s documents, original material, and any notes they have about the content.

Sometimes the SME will be so pressed for time or poor at outline that it makes the most sense to everyone for you to do the first pass. This approach can often be much simpler and more efficient, and even the quickest of the three methods. In the long run, however, it’s much better for everyone if you teach your SME to give you what you need so they’re in the driver’s seat as opposed to you taking the lead. That said, in high production capacity pipelines, tight deadline environments, or even situations where you know exactly what you want a piece of content to look like, this route can be right for your projects.

Use this approach as a tool at your disposal and make the call when it’s enabling a SME who should be doing it on their own, and when it’s the right method for your project.

Approach works for:
   • The SME who has limited time
   • Doesn’t really want to be bothered with the project
   • Isn’t used to touching much of his or her content anymore because of other commitments or priorities
   • SME who is willing to share any and all existing documentation related to the project

Approach does not work for:
   • SME’s not willing to provide you full disclosure on documentation that they have related to the content of the project
   • SME’s who are used to being very involved in each step
   • SME’s developing content for a specific medium for the first time
Three things to keep in mind:

1) Adopt the mindset of the learner - You have to have enough confidence in the material and the background research to present a credible quality outline. If you barely know the topic and haven’t done all of your homework, this method is going to backfire, and fast. But if its content you know a lot about, maybe it’s what you used to do, you’ve already done 10 courses in this area, then you’ll likely have the information you need to do it justice.

At the same time, you have to adopt the mindset of the beginner learner. The balance is knowing enough to guide the content, but being able to separate what you might know from what the learner needs to know.

2) Think chronologically - Ask yourself questions such as “..then what happens?” What would I need to do first? What are the over-arching principles? What other questions would come up? The SME will have to validate your instinct here.

3) Invite SME collaboration on those final touches – You’re building the skeleton of the course when you do an outline. It has to be sturdy, but the SME has to make that skeleton into a living breathing thing. Give them enough to shape and work with so the final product is cohesive and sensible, but at the same time, let them make those final edits and tweaks to bring the content to life. Have them look for factual correctness, order of topics, and for any missed points.

The last thing the instructional designer wants the SME to think is that the instructional designer is telling them how the content needs to be. Rather, you want to ask questions that a learner might have so that it gives the SME the opportunity to think like a beginner rather than as the expert that they are. Done right, the outline you put together can be elegant, fast, and helpful, but it always comes back to that collaboration between the two of you that brings the content to life.

Third Approach: Instructional Designer Interviews SME and Develops Content Outline on the Fly

In this approach the Instructional Designer uses the power of questions to elicit an outline from the SME in a conversational format. The Instructional Designer assumes the persona of the student of this content and asks the questions that the beginner might have to determine what belongs and in what order. They are building the outline on the fly. Later, the content is then shared back with the SME for review and edits. The benefits of this method is condensing the time it may take that back and forth collaboration might have. Well-crafted questions are open-ended and meant to invite exploration of a topic. Think of the five w’s and one h – who, what, when, where, why, and how questions. These types of questions bring clarity to the person answering them and give the SME new opportunities to think of their content differently. To pull this off, you need to know enough about the SME’s content to ask these questions, but not so much that you’ve formed these hard and fast opinions.

Approach works for:

- SME’s who haven’t found the heart of their content yet and don’t know exactly what they want to say or how to boil down everything they know into what’s relevant for this project
- SME’s who like the human interaction and need to think out loud to do their best work
- SME’s who have time to devote to the project and see a number of ways we could slice and dice the content

Approach doesn’t work for:

- SME’s who need to take the lead in the process
- Need multiple collaborators on their end to bring all their content together
- Have a really rigid idea of what their content should look like

Last Updated: April 9, 2015
Questions to ask:

Introductory Questions:
- What are the biggest pain points about this content?
- What’s the first thing people need to know about this content?
- Where do people stumble?
- What’s the most important thing you want to leave learners with once they learn this content?
- If you had to distill your content into a just a few main points, what’s the first point you’d make? What are the other ones?
- Is there a system or process you use to explain this content?
- What often surprises people about this content?

Mid-Outline Questions
- So that’s Step 1. What happens next?
- So let me recap what I’m understanding. Then can you tell me if we have any discrepancies?
- Is there a sequence or an order to this part of the process?
- Does this connect back to (something else that’s been mentioned)?
- Are these concepts linked?

Recap Questions
- What are we missing? Did we leave anything key out?
- Did we cover all the places someone might stumble in learning this and give them solutions?
- What will I be able to do when I’m done going through this content we’re creating?
- Let me share the sequence of topics back with you. Can you let me know if I have any in the wrong order?
# Bloom’s Critical Thinking Cue Questions

Cue Questions Based on Bloom’s Taxonomy of Critical Thinking

<table>
<thead>
<tr>
<th>Lower-Order Thinking Skills</th>
<th>Higher-Order Thinking Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. REMEMBERING</strong></td>
<td><strong>4. ANALYZING</strong></td>
</tr>
<tr>
<td>• What is ...?</td>
<td>• What are the parts or features of ...?</td>
</tr>
<tr>
<td>• How is ...?</td>
<td>• How is ______ related to ...?</td>
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<tr>
<td>• Where is ...?</td>
<td>• Why do you think ...?</td>
</tr>
<tr>
<td>• When did ______ happen?</td>
<td>• What is the theme ...?</td>
</tr>
<tr>
<td>• How did ______ happen?</td>
<td>• What motive is there ...?</td>
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<tr>
<td>• How would you explain ...?</td>
<td>• What conclusions can you draw ...?</td>
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<tr>
<td>• How would you describe ...?</td>
<td>• How would you classify ...?</td>
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<tr>
<td>• What do you recall ...?</td>
<td>• How can you identify the different parts ...?</td>
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<tr>
<td>• How would you show ...?</td>
<td>• What evidence can you find ...?</td>
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<tr>
<td>• Who (what) were the main ...?</td>
<td>• How can you make a distinction between ...?</td>
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<tr>
<td>• What are three ...?</td>
<td>• What is the relationship between ...?</td>
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<tr>
<td>• What is the definition of...?</td>
<td>• How can you make a distinction between ...?</td>
</tr>
<tr>
<td>• How would you summarize ...?</td>
<td>• What is the function of ...?</td>
</tr>
<tr>
<td><strong>2. UNDERSTANDING</strong></td>
<td><strong>5. EVALUATING</strong></td>
</tr>
<tr>
<td>• How would you classify the type of ...?</td>
<td>• Why do you agree with the actions? The outcomes?</td>
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<tr>
<td>• How would you compare ...?contrast ...?</td>
<td>• What is your opinion of ...?</td>
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<tr>
<td>• How would you rephrase the meaning ...?</td>
<td>• How would you prove ...? disprove ...?</td>
</tr>
<tr>
<td>• What facts or ideas show ...?</td>
<td>• How can you assess the value or importance of ...?</td>
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<tr>
<td>• What is the main idea of ...?</td>
<td>• What would you recommend ...?</td>
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<tr>
<td>• Which statements support ...?</td>
<td>• How would you rate or evaluate the ...?</td>
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<tr>
<td>• How can you explain what is meant ...?</td>
<td>• What choice would you have made ...?</td>
</tr>
<tr>
<td>• What can you say about ...?</td>
<td>• How would you prioritize ...?</td>
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<tr>
<td>• Which is the best answer ...?</td>
<td>• What details would you use to support the view ...?</td>
</tr>
<tr>
<td>• How would you summarize ...?</td>
<td>• Why was it better than ...?</td>
</tr>
<tr>
<td><strong>3. APPLYING</strong></td>
<td><strong>6. CREATING</strong></td>
</tr>
<tr>
<td>• How would you use ...?</td>
<td>• What changes would you make to solve ...?</td>
</tr>
<tr>
<td>• What examples can you find to ...?</td>
<td>• How would you improve ...?</td>
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<tr>
<td>• How would you solve ______ using what you have learned ...?</td>
<td>• What would happen if ...?</td>
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<tr>
<td>• How would you organize ______ to show ...?</td>
<td>• How would you elaborate on the reason ...?</td>
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<tr>
<td>• What approach would you use to ...?</td>
<td>• What alternative can you propose ...?</td>
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<tr>
<td>• How would you show your understanding of ...?</td>
<td>• How can you invent ______, to create a different ...?</td>
</tr>
<tr>
<td>• What other way would you plan to ...?</td>
<td>• How could you change (modify) the plot (plan) ...?</td>
</tr>
<tr>
<td>• What would result if ...?</td>
<td>• What could be done to minimize (maximize) ...?</td>
</tr>
<tr>
<td>• How can you make use of the facts to ...?</td>
<td>• What way would you design ...?</td>
</tr>
<tr>
<td>• What elements would you choose to change ...?</td>
<td>• What could be combined to improve (change) ...?</td>
</tr>
<tr>
<td>• What facts would you select to show ...?</td>
<td>• How would you test or formulate a theory for ...?</td>
</tr>
<tr>
<td>• What questions would you ask in an interview with ...?</td>
<td>• What would you predict as the outcome of ...?</td>
</tr>
<tr>
<td>• How can a model be constructed that would change ...?</td>
<td>• What is an original way for the ...?</td>
</tr>
</tbody>
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Public Consulting Group’s Center for Resource Management, in partnership with the Council of Chief State School Officers (August 2007)
Tips for Managing Deliverables
The way you work with your SME on their deadlines affects their ability to meet those deadlines. The difference between putting a calendar reminder on their schedule versus an email that tells them their due dates can sometimes be the difference between whether or not they blow the deadline off or they get their information turned in early. Here are some tips to help you manage your deliverables:

- Phone them. Provide phone check-ins regularly to stay in touch.

- Use a collaboration project management tool such as asana.com or trello.com

- Provide calendar reminders. Place calendar reminders on the SME’s calendar if you need to keep them moving. You should put a reminder a week before the due date and a second on the date itself.

- Make sure expectations are clear. Specificity and clear deliverable expectations will make your project successful. You can say things like “Send me that outline by the 15th.” You should always be clear what you want, who is responsible for getting it done, and when the task is due.

- Consistency in deliverables may also help. Make your deliverables on Mondays to give your SME the weekend if need be.

- Have one master schedule that shows what’s needed and gives the SME a visually pleasing big picture. You can use Google Drive, Asana.com, Excel or some other solution. This should be kept in a place that both you and the SME can access.

Motivating and Engaging the SME
The best instructional designers know how to wear multiple hats, sometimes all in the space of an hour of project work. You may have to play the role of task master, cheerleader, coach, editor, project manager, and friend. Motivating and engaging your SMEs is one of the most critical parts of building and maintaining a strong relationship and designing the best instruction for your audience.

1. Develop an ability to put yourself in their shoes, or have empathy, and use that to frame your collaboration. Listen, care, and problem-solve, and try to understand them rather than commanding them or telling them what to do. The instructional design process isn't a natural one for many SME’s. It’s more of an extra task on top of a full-time job, or an exercise that stretches them in an uncomfortable way. Sure, some of them are doing it as part of their job, but even so, take a leadership role in this collaboration, and make it your job to develop empathy as your default. Even when you might be frustrated, or feel like you’re doing all the heavy lifting, if you look at it as your job to make everyone on the project successful, it reframes your efforts in a positive light.

2. Build success spots. This is where your SME has quick frequent wins that builds momentum and interest in continuing strong on the project.

3. Make it your job to be transparent and feedback friendly. Notice and appreciate the work your SME is doing, and let them know how it’s going.
Be nice to your SME and make the collaboration, the schedule, and the feedback, opportunities to connect, rather than confront. A little kindness goes a long way.

**Incorporating Feedback**
You can tell you’re giving feedback well when your SME tells you that you make them sound and look better.

1) Always provide direct feedback. “Bob, I know you told me you wanted direct feedback when we need to make a change. So in the spirit of that request, I really think we need to change how this part is written.”.

2) Avoid the “feedback sandwich”. The sandwich is where you would say a good thing, a thing that needs to be worked on, and then another good thing. The problem with this method is that it sends a mixed message to the SME. They heard two positives and one negative, so, what if they only remember the positive and forget what you need them to do? Look for specific – stand alone- moments when good feedback...and only good feedback can be given. This way when you need to give critical feedback, you can concentrate on delivering only this. Don’t deliver mixed messages. Keep your messages clear.

3) SME’s will also give you feedback. Regardless of whether it is direct or “fluffy” you will need to have thick skin.

4) SME’s consider their work sacred. It often represents hundreds of hours of work, hard choices, long hours, and deep thought. Anything that forces them to reconsider or change what they are used to doing requires a mental shift and a lot of maturity about their baby. Handle your feedback with care, but do so directly.

**Resolving Common Obstacles**
Often times when working with SME’s there are several common obstacles that will crop up. Luckily, there are remedies for each of them that really rest on you setting expectations and following through with your SME on your scope of work.

1) SME misjudges the amount of time your collaboration will take. They can reach a breaking point, or dropping off the radar point, where it’s radio silence when you’re expecting deliverables or information to roll in. The remedy, give your SME an idea up front of who much of a job this will be for them, how long it will be, and that it will be a process of giving and taking feedback.

2) Ask for the commitment you need. Don’t just leave it at that with your estimate, be blunt. Can you give me the time of three to five hours? It’s important for you and the SME to hear that yes or no up front so you can continue to refer back to it if things get dicey.
3) If your SME is in a non-cooperative stage, it’s often helpful to take your requests offline and put in a phone call. Address the elephant in the room expeditiously. You can be direct by telling your SME “We’re in danger of needing to cancel our next meeting because we aren’t prepared for it if I don’t have your feedback by Friday.”

4) The SME starts to get really uncomfortable with the collaboration and defensive about the content and how it’s changing to accommodate this format or audience. You may hear remarks such as “I don’t know how you could possibly take what I do and make it a one hour training course” or “…but you don’t understand” or lastly, “there’s no way this can work”. You may hear criticism behind your back to team members, snide comments, etc. You’ll need to have thick skin here. Realize that this type of obstacle comes from a place of insecurity with the medium, or the content changes, or maybe even the whole arrangement. Do your best to employ empathy. It’s your job to create an atmosphere of comfort and collaboration always. Try soothing these pangs of insecurity with simple re-directs by acknowledging the SME’s frustration. Tell them that you need their expertise to finish the project. Then directly ask them “Can you help me understand what we need to adjust to finish the last part of our work together?” It’s your job to help the SME be as comfortable as possible.

5) The SME becomes aloof. This is likely because they’ve started another project or because they trust what you’re doing so much that they don’t see the need to keep investing in the relationship. This happens like a kind of shorthand when you’ve worked with someone for a while, and you have that trust built up. If it happens early or often on project where you need a lot of participation, it can be a problem. A remedy that often helps is to remind them of yours and the SME’s commitment and reiteration of what you need to proceed. You can say something like “Bob, I love that you trust me to finalize this handouts on my own, and I’m going to assume that if you don’t edit them further before Friday that you’re also signing off on all the content being accurate”.

Telling someone you’ll assume inaction equals an approval or a finalization often jolts them back to responsibility if they’ve been focused elsewhere. The key to handling every obstacle that comes up is not these magic phrases to turn the collaboration around, though they are terrific. It’s more about an understanding of how to motivate and engage your SME and continue to create a comfortable environment. This is where your leadership skills get a serious workout on some projects, and also where you develop the strength to handle any SME interaction with grace and poise.

**Summary**

In this course you learned what a SME is, tips on relationship building, outlining the content of your training, and steps to working with the SME to manage deliverables.