A Step-by-Step Guide

How to get the most out of your SME relationship

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Introduction

Communicating with subject matter experts (SMEs) and stakeholders are the two biggest challenges freelance IDs face (apart from money issues) according to our study. There's lots of misunderstanding, irritation, and even sabotage on the part of the SMEs. The following guide will help you get the most out of your relationships with SMEs and stakeholders and reduce all the risks to a minimum.

This guide is based on the webinar session with Tom McDowall, Chair of The Learning Network. You can watch the entire session here.

And feel free to follow Tom McDowall for more insights into instructional design and eLearning:

- https://www.linkedin.com/in/tom-mcdowall
- https://twitter.com/tommcdowall3
- https://www.youtube.com/@InstructionalDesignTips

Step 1

Identify the type of SME

Before you actually start working with a subject matter expert, you need to make sure you know who you're dealing with and what value they can add.

Tom McDowall outlines three categories of SMEs:

01

Technical

They provide content knowledge and check to see if every detail related to the content is correct. They have years of experience on the subject matter and can share unique expertise. You'll design learning experiences around the fundamental information they provide.

02

Functional

These SMEs share audience and implementation knowledge related to modality and design. They might not know the subject thoroughly but they are the best experts on all processes related to it. For example, if you need to prepare a software tutorial, functional SMEs will tell you about every button and what issues users most often encounter.

03

Sentinel

These are senior stakeholders and board members with minimal technical or implementation knowledge. They want to be involved in your project just to be able to tell other board members that they were involved. However, they do add value to your work – sometimes when you need to get something done, it's only having their name attached to your project that will do the trick.

You need to be careful at this stage and ask SMEs only those questions that fall within their expertise. Otherwise, if you ask a senior stakeholder about content, for example, they'll either just say they don't know (if you're lucky) or will take a guess, which might affect the quality of your content later on.

Step 2

Determine their motivation

One of the crucial aspects of effective communication with SMEs is knowing their motivation. It matters. Experts from within a company and external experts who volunteer to help you with your projects have completely different levels of involvement. You should take this into consideration and interact from that perspective.

There are two ways to categorize SMEs based on their motivation: by whether they belong to a company and whether they’re getting paid. Let’s start with the first one:

01

Internal

Experts from within the organization. They are actively involved in your project, care about the result, and are motivated to do the best they can to make an impact on their team and business

02

External

Wider industry experts and professional SMEs. They don't belong to the organization you're doing the project for, so they are unlikely to want to go that extra mile and explore exactly what their subject matter will look like in the final product. At least, not right away. They need some more time to get up to speed. And it's fine if you know this from the start and play a long game.

Another important factor you need to consider is whether an SME is getting paid. Here's how it affects your relationship with them:

Paid

These are specialists who offer dedicated time and are used to working as SMEs. As they are paid to work with you, they're under increased pressure and are more willing to help.

This subtype includes not only paid external experts but internal experts as well – their supervisor just needs to tell them that they are to work with you for 10 of their 40-hour week, for example. Then it becomes their official duty, for which they're paid.

Volunteer

These are experts who want to help but are required to fulfill other responsibilities as well. Even if these SMEs are highly motivated to add value to your project, they may simply lack the time to be 100% into it. You might need to adjust to their schedule to make the most out of your relationship with them.

Once you identify the type and motivation of an SME, you can understand clearly what that SME can do for you and why they do it. Knowing the what and why of it will make your work a lot easier and more productive than working blind.

Step 3

Make friends with them

The worst thing that can happen to your relationship with an SME is when you come to them only when you need them. Nobody likes people who show up only when they need your help moving, for instance.

A more productive approach would be getting to know them and making friends with them. Here are some tips on how to achieve that:

01

Build relationships from day one

Day one isn't the day when you need to interview an SME. It's the very first day you start working on the project. Try to identify potential SMEs who could be useful for your project and have a brief chat with them. Introduce yourself and ask how you can help them in terms of training.

02

Generate social capital

Social capital works just like your bank account – you can't use it if it's empty. And you do need to use it. Whenever you have burning deadlines or need to ask SMEs for extra time – it's only social capital that will help. So, work on it whenever possible from the very start.

03

Always be easy to work with

The biggest issue SMEs face when communicating with instructional designers or L&D specialists is when those aren't easy to work with. Here are some of the most common examples:

- Forcing SMEs to work in ways they're unfamiliar with
- Using jargon
- Forcing them to do something they don't need to, like getting to know the essentials of instructional design

An SME wants to know only what precisely they need to provide you with to get your project moving and help the business. They don't need to know about
ID models, synchronous or asynchronous learning, authoring tools, etc. – this is all about learning experience design, which is your job, not theirs.

Step 4

Define the relationship

People need to know where they stand, what they're responsible for, and who they are working with. It's not enough to just say that you're an ID and they are an SME. An SME might be performing this role for the first time and may have no idea what it includes. So, you need to make your relationship very clear to ensure it'll be effective.

Here's what you need to clarify:

Roles

Keep these simple and clear – who reports to whom and in what capacity.

Responsibilities

Everyone must have clear deliverables and an understanding of what they are responsible for.

Input

Who will have input on what aspect of the project? Not everyone will be involved in every decision.

Sign off

Who will have the final sign-off on each aspect of the project?

If you get this stage right, it will be much easier for you to work with an SME afterward. For example, let's say an SME doesn't like the color of a course player and you don't like the language used in the course. If you clarified that an SME has no input on visual design and you have no input on language, everyone's happy. Otherwise, you'll have difficulties debating on multiple aspects and details.

Step 5

Help, adapt, and guide

From this moment forward, you're the one calling the shots. And you bear all the responsibilities. If you don't keep an eye on all the aspects, the project may fail.

Here's what you need to do:

Vision

Paint a picture of the completed project.

Map

Show how each step moves the project toward success.

Ownership

Remember that you are delivering the project, but you don't own it.

Simplify

Provide simple guidance, checklists, and process maps.

Communicate

Use stand-up meetings, town hall meetings, and lunches to have open and honest conversations on the project. Keep everyone in the loop.

Lead

Step outside of your process. But remember that nobody likes to be forced into ways of working that they're unfamiliar with. So, make sure you don't do this.

Step 6

Wrap up and review

The end of the project does not mean the end of the relationship. A wrap-up is just as important as a stand-up and can drive continuous improvement from project to project.

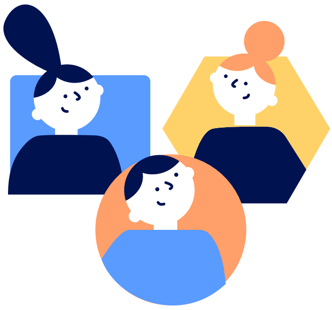
Here's what you need to do:

Celebrate success

Take the time to celebrate a successful project or milestone. This will keep morale high and enhance future performance.

Share feedback

Collect and share honest feedback from all parties.



Workshop

Make sure to run a lessons learned workshop for all involved and identify key improvements for future projects.

Reflect

Allow time for personal reflection on your performance, the process, and the project's outcomes.

Would you do it again? Were you happy with the project? Reflect and analyze your answers. And before blaming SMEs or stakeholders, start by assuming that you're the problem. This won't always be the case, but it will definitely help you grow and avoid unfair criticism.

If you're interested in this topic, be sure to watch the entire webinar with Tom McDowall for more insights and tips.

2 Ways

to Work with SMEs with iSpring Suite

iSpring Suite powers the full cycle of eLearning content development, including the phase of working with SMEs. Let's see how to use iSpring Suite's online tools to get the most out of this stage.

01

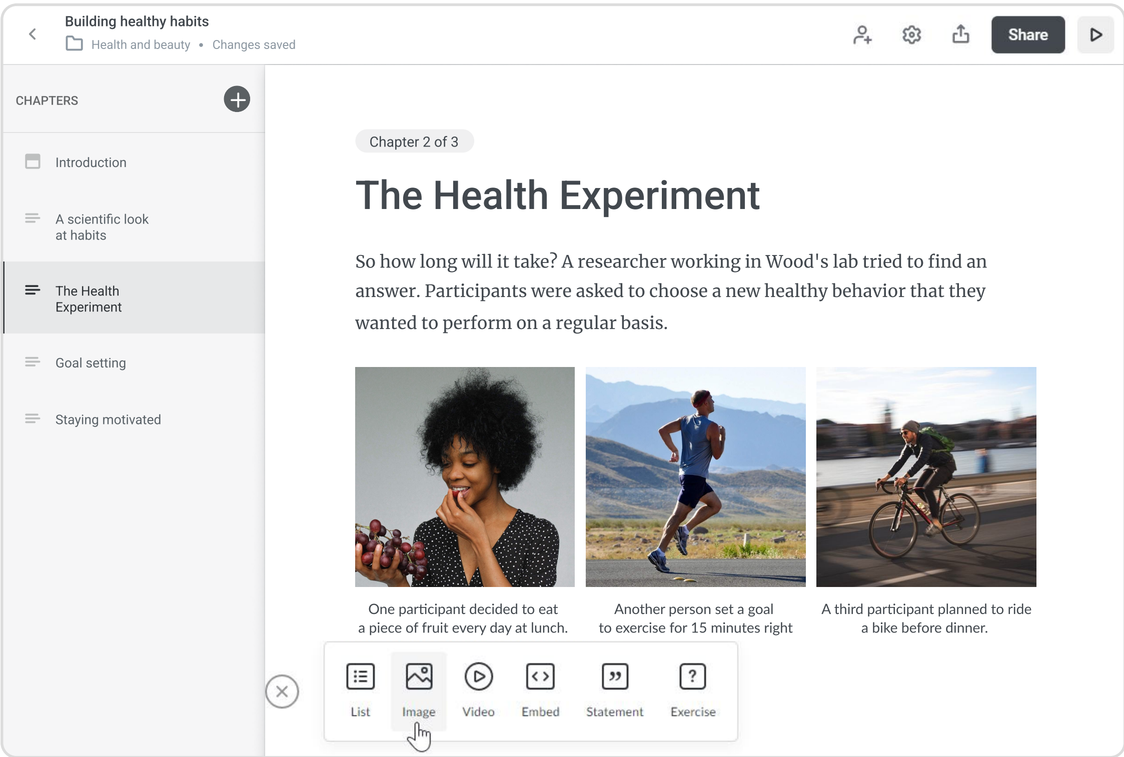
Let SMEs create content

If you work as an L&D professional in an organization, you know that you don't always need a complex course with multiple slides, digital activities, and advanced content, like branching scenarios and animations.

Sometimes (in some companies, most of the time) you need something short, like a product update training. In such cases, the best option is to let SMEs create training content themselves with your assistance.

iSpring Suite is an extremely easy-to-use online authoring tool for creating such trainings. An SME only needs to write a short article, and then you can join them in the online editor to help build a few interactive knowledge checks, highlight the main ideas, add multimedia elements, etc. In other words, you make the learning experience more engaging and interactive.

Here's what the content development process looks like:



See how to create such trainings with iSpring Space (iSpring Suite's online tool) step by step here.

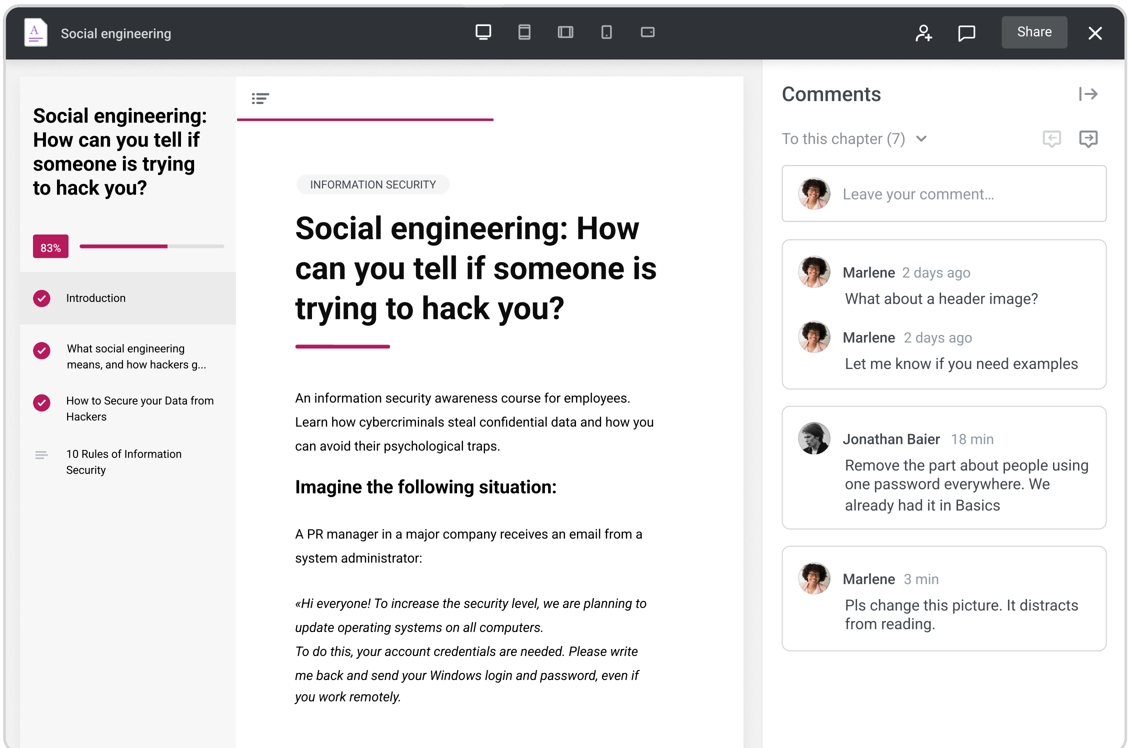
02

Review course drafts online

Another way to accelerate and simplify your work process with SMEs using iSpring Suite is to review draft versions of your course online. There's no need to zip your course every time, or publish it to an LMS and then ask SMEs to write their feedback and send it to you (where they always forget to mention a thing or two, and thus you have to go to yet another round of the reviewing process).

Simply upload your course draft to iSpring Suite's online storage and share a link to it with an SME. They'll be able to view your course and add comments to each slide, each step in an interaction, every quiz question, and any scenario scene.

It's just like the comment mode in Google Docs, but for eLearning courses. Here's what it looks like:



Learn more about reviewing content with SMEs using iSpring Suite here.

ispring suite

A 30% discount for freelancers on iSpring Suite

Take on more projects and deliver them faster. iSpring Suite empowers you to create any eLearning content you need, from interactive online courses and quizzes to training videos and role-play simulations.

Your subscription also includes:

- An online tool for reviewing content with stakeholders
- An online tool for collaborating with SMEs
- Cloud storage for courses
- An extensive library of eLearning content created by professional graphic designers
- A tool for crafting and hosting an ID portfolio
- A character builder
- And more

Try it for free

Learn more →

Welcome to the iSpring Community!

Feel free to join and become a valuable part of a community of instructional designers and eLearning professionals who are taking training to the next level with iSpring.

Fast forward to the part of our community you like - just scan the relevant QR code.

LinkedIn Knowledge Hub →

Connect with others in your field, ask questions, share your own expertise, and take part in discussions.

Blog →

Explore the exciting world of eLearning together with our helpful articles and how-tos.

LinkedIn →

Youtube →

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