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SECRETS TO SUCCESSFUL SME PROJECTS

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SECRETS TO SUCCESSFUL SME PROJECTS

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Dealing with subject matter experts (SMEs) is one of the most important competencies of a technical developer. This competency is essential, but it can be challenging. A successful developer is able to produce results within this sometimes frustrating relationship.

If you're reading this issue, chances are you have some stories to tell about great SMEs and those who were a bit difficult. Let's be honest here: We can't do our jobs without our SMEs, but we all want to know how to make it easier to work with our SMEs. What if the secret is in how you approach them before, during, and after the project?

We believe the key to working with SMEs is in how you prepare for each of these three project stages and how you apply the information you have at your fingertips. This issue will provide you with strategies for communicating with different SMEs throughout the life cycle of a development project.

In this issue of *TD at Work*, you will learn:
- the three main phases of your collaboration with SMEs

- the types of SME personalities best suited to different types of projects

- how best to work with SMEs during each phase of the project: before, during, and after

- what to do when things don't go according to plan.

THREE MAIN PROJECT PHASES

Think about the three main phases of the project: before, during, and after. Sometimes, they might look like this:

Before
- You have one month's to one day's notice that a project is coming your way.

- You enter into a stakeholder meeting knowing zero about the project or people involved.

- You have some information on the project, but everyone seems to think your role is instructional designer, graphic artist, and SME—all rolled into one convenient person.

During
- Missed deadlines reign above almost all other challenges.

- The SME doesn't seem to have time to devote to project development.

- The SME has decided he needs five to eight people to review each development step of the project, which confuses the objectives, fragments the work, and stretches the time required.

After
- The debrief meeting to discuss project challenges, areas of improvement, and successes just doesn't seem to happen.

- The debrief meeting happens but is a gripe session.

- There is no opportunity to ask for referrals within the organization or future work if you are a contractor or consultant.

We are here to help you manage and change these typical scenarios. Using a few tips and processes, you can change the outcomes during all three phases. Let's look first at the stage *before* the project.

BEFORE THE PROJECT

Before development officially begins, you will undertake some important tasks, including choosing a subject matter expert (SME), holding a kick off meeting, and writing a scope of work statement.

Choosing a SME

Deciding which SMEs will be assigned to a project is an important decision. This can impact the success and eventual duration of a project. (It also can impact the mental health of a developer!) The book *Technical Training Basics* explains that a good SME:

SME PROFILES: WHO WOULD YOU PICK AND WHY?

Three SME profiles we see a lot are what we call Busy Betty, Skeptical Sam, and Overly Complex Olive. We will describe them and explain which SME we would pick for three separate project types: immediate need, multiple SMEs, long term.

- Busy Betty cannot say "no." She wants to help, but she has spread herself so thin that she is not helpful to the process. When you ask Betty questions, she is typically performing another task and not giving you her full attention.

- Skeptical Sam had a negative experience with training and now needs to be coaxed into cooperation. Sam is notorious for answering a question with a question.

- Overly Complex Olive has been an engineer for so long that she has forgotten how to discuss a topic in simple terms. Olive is notorious for setting records for long answers using the most complicated words available.

We recommend working with **Busy Betty** for projects that must happen now, right now. You might think she is too busy, but truly, she brings these skill sets with her for development:

- organizational skills

- speed

- laser focus when face-to-face.

The ability to organize and multitask, plus the speed needed to produce *now* will appeal to Betty's capabilities. The implied importance of the learning project will be a positive for her. Always, always work with this SME type in a face-to-face environment. If you must use a communications platform, be certain you have video capability or Busy Betty will be instant messaging a colleague during your development meetings while also possibly walking the dog or taking a jog in the park.

Skeptical Sam is a great choice for projects with multiple reviewers. He can be your point person to manage them and bring the content back to you fully validated and ready for instructional design strategies. We see Skeptical Sam as having these main qualities:

- forcing a defense to added content

- detail orientation

- career-long support for those he has worked well with.

Skeptical Sam will insist that a reviewer defend each content change, which will probably decrease late-stage revisions. Sam also brings an eye for detail to the project; otherwise, he would not be able to answer each question with another question. Convince him that he can come out a winner from working on this project and truly listen to his knowledge. Skepticism can fade into complete support once this SME understands the value you bring to the learning domain.

At first thought, it might seem strange to you, but **Overly Complex Olive** will work best on a long-term project and as a solitary SME. These qualities are her main contributions:

- complete command of the topic and a love of sharing knowledge

- enjoyment of linear concepts of charting and graphing

- preference for working alone.

A long-term project will suit Olive's need to communicate complicated concepts in great detail. She wants to share her knowledge, but she may not work well with multiple SMEs. She will appreciate high-profile projects and understand their importance. We suggest long-term projects because the time she dedicates to the content will be lengthy—but needed for a large project. Work with her long enough, and she eventually, with your help, will simplify her language.

- has knowledge of the subject

- uses good communication skills

- is available

- has experience designing a course

- possesses knowledge of adult learning

- admits when he or she "just doesn't know"

- is connected

- is neither too general nor too detailed

- is decisive

- cares.

Essentially, these characteristics can be pared down to three main areas: knowledge, availability, and personality. Knowledge will be domain specific. Availability is whether the estimated project development hours fit within the SME's daily, weekly, and monthly schedules. And personality directly relates to the SME's interpersonal communication skills.

The Kickoff Meeting

Once your SME is chosen, it's time for the project kickoff meeting. The kickoff meeting should follow these steps:

1. Explain what's in it for the SME.

2. Establish your credibility.

3. Explore adult learning.

4. Describe what to expect.

5. Complete a risk mitigation analysis.

Explain What's in It for the SME

Framing the project correctly, or describing "what's in it for them," is a critical step when working with SMEs. Gather all the information you can on the SME before the initial meeting. Look for the SME's involvement in other learning projects, along with people he has worked with before. Try to find some areas of commonality–previous training experience, jobs held, university attended, or even hobbies. Ask others in the organization what they know about your SME.

The goal of this "SME reconnaissance" is to help you highlight how working on the project will benefit the SME. The project usually moves more efficiently if the SME is totally invested in the outcomes.

Think about this question to determine the WIIFM, or "what's in it for me," for your SME: *How will your SME personally benefit from this training being complete?* Some answers to this question might be:

- formally being recognized as an expert

- having to answer fewer questions via email

- fewer issues requiring late-night troubleshooting

- fewer mistakes made in the field

- a better-performing organization

- learning a new skill set (instructional design).

It also is worth thinking about some potential barriers to WIIFM, and, more important, how you will overcome those barriers. For example, a SME may see sharing her knowledge as reducing her own "expert status" or job security. In that case, it would help for the SME to be able to see her name prominently on the project. You could frame the project benefits with statements like these:

- "This is a way for everyone to see you were the main contributor for this course."

- "People will be impressed that you are willingly sharing your knowledge."

- "After this class is finished, you will be able to avoid time wasters and spend your time troubleshooting the most important and complex issues."

Establish Your Credibility

The next step of the SME kickoff meeting is to establish your credibility. You are the mysterious instructional designer, and your clients and SMEs may not be quite sure what you do. It is your job to explain and defend your field of study and establish credibility with your colleagues.

You should answer this question about yourself: *What value do I bring to the development team?*

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