



Trainers frequently call on subject matter experts (SMEs) to tap into their experience and expertise, so that the trainers can design and facilitate workshops with rich content. Sometimes, however, trainers must rely on SMEs to design and deliver workshops themselves. When that happens, trainers can follow time-tested strategies to help the expert succeed.

When considering whether to ask an expert to design or facilitate a workshop, a trainer must first carefully assess the need for the SME to take on these roles. If the only reason to ask the expert is because the trainer is short on time, then the request is tenuous because it will require time to prepare and coach the SME.

If the expert would make the best trainer on a particular topic because of her unique knowledge, the needs of a particular group of training participants, or the requirements of a specific project, then the trainer can proceed with the request.

To convince an individual to take on the responsibility for a workshop, a trainer should honestly explain the specific reasons for the request. Any recognition of the SME's background, insights, and strengths should be sincere, because false flattery will breed skepticism about working with the trainer. At the same

# The Reluctant Trainer

**Turning subject matter experts into trainers.**

By Trinée Adams, Alejandra Kennedy, and Matthea Marquart

time, the trainer needs to openly appreciate the time and work that the request would require from the SME and offer support to minimize the workload and maximize her potential for success.

For an expert who fears public speaking, begin with reasserting why the SME was selected for this role. Be genuine and specific when listing the individual's strengths and remind the SME about her own achievements, which may have been forgotten. Note that the organization would only allow competent and capable people to conduct training, which means that the expert has the organization's confidence.

Review the workshop materials with the SME, and make sure they are well scripted and marked up with plenty of visual cues for the trainer. Coach the SME on facilitation skills. Provide her with detailed information about the participants, including their current professional roles, backgrounds, and why they are attending the workshop.

Give the expert permission to delegate tasks during the workshop. For example, for individuals who are nervous about simultaneously facilitating a workshop and running a PowerPoint presentation, suggest that the SME find a volunteer workshop participant to be responsible for clicking through the slides. Or if the SME is nervous about flipcharts, a volunteer could handle the writing.

For perfectionists who are anxious about not doing an adequate job, focus the SME on the impact of the workshop. Note that to achieve the workshop's goals, it is not necessary for every second of the workshop to be perfect.

### Inexperienced speaker

When experts lack experience in public speaking, consider whether co-facilitation is possible so that someone can share the role of the trainer. If possible, allow the expert to observe a more experienced trainer conducting a similar workshop beforehand so that the SME can see an example of high-quality facilitation. If the experienced trainer is willing, suggest that the SME act as a training assistant during the observed workshop so that the she

can experience some of the trainer's spotlight in a safe environment.

Whether the SME will facilitate alone or with a partner, prepare her by providing a checklist of the basics of engaging facilitation, including setting up the room to meet the participants' needs, establishing rules with the participants, and establishing a rapport with the participants by presenting a friendly demeanor and sharing stories. Incorporate tips such as pacing the workshop to match the time allotted, walking around the room, fielding questions, promoting an open dialogue, and incorporating interactive activities. Review the checklist with the SME and explain the reasons behind each tip.

Discuss adult learners' needs and learning styles, so that the SME understands how and why to vary the workshop activities to maximize learning. Share games that help participants retain workshop content, such as bingo games with key concepts, team trivia competitions, and energizers related to the workshop content. In addition, help the expert think about charts, illustrations, and other visuals that would help participants understand the content. Draw the visuals together so that the SME has them ready for the actual workshop.

It is important to teach the expert how to facilitate a workshop accurately without reading from the leader's guide. Offer tips for remembering content, such as writing detailed workshop agendas on flipchart paper with private reminders written in pencil, creating note cards with key points, or posting flipcharts with important messages around the room.

### Time-saving supports

When SMEs are clearly short on time, provide support in advance. For example, conduct any research the expert needs about the workshop topic or logistics. Make sure that she does not have to worry about ordering training supplies, photocopying handouts, or setting up the facility. The expert will appreciate the ability to focus limited time solely on workshop preparation and facilitation, without other logistical concerns.

Create a pointer sheet for the SME with tips on how to manage real-time



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training challenges that are relevant to the organization. For example, share the organization's common strategies for handling a dominant talker, a class clown, or a sleeper. Include tips for handling the session when time runs too quickly or too slowly.

If time is a particularly urgent concern, offer to help the SME with a competing deadline so that the other work is completed and the expert can think clearly about the workshop.

If the presentation is ready in advance, watch the expert conduct a practice workshop. Provide feedback, beginning with all of the positive behaviors demonstrated during the trial run and including one or two constructive comments that the SME can realistically work on before the actual workshop. For a nervous SME, consider only offering one piece of constructive advice, so that she can focus on preparing for the workshop rather than panicking about all the things that need to be changed.

To help prepare the SME to facilitate a workshop, offer to mark up the leader's guide with cues about the various activities (for example points to paraphrase in green and questions to ask in yellow). In addition, offer assistance during the actual workshop, with flipcharts or distributing materials.

## A reluctant expert

Keep reluctant SMEs focused on the big picture and make sure they understand the positive influence their training facilitation will have. Ask them to visualize the future after they have completed the training and imagine the positive results they will have contributed. Write down their expectations and revisit them periodically as reminders.

Gauge the experts personal preferences regarding pressure. For some, pressure is a wonderful and much-needed motivator, but others find too much pressure suffocating and a waste of time.

Build motivating tokens periodically into the project plan. Inexpensive tokens of appreciation include thank you cards, certificates of appreciation, cookies or candy, or public expressions of gratitude at meetings or via

group emails that include the expert's supervisor. Incorporate the expert into a team working on a larger project that includes the SME's area of knowledge.

Inspire experts with meaningful quotations about the value of teaching others. Frequently used quotations include "Each one teach one," (anonymous) "The end of all education should surely be service to others," (Cesar Chavez), and "Give someone a fish and you have fed them for one day; teach someone to fish and you have fed them for a lifetime" (Chinese proverb).

## Design tips

Provide experts who must design their workshops with PowerPoint templates, sample training materials, and examples that they can build on. Recommend a format for the leader's guide and participant handouts so that she can focus on content rather than formatting. In addition, provide access to experienced instructional designers who can assist the SME when questions arise.

Make sure the expert understands the need to design interactive activities that appeal to visual, kinesthetic, and auditory learning styles and that balance work between partners, small groups, and large groups. Encourage the SME to use PowerPoints sparingly with appropriate graphics that add meaning to each slide.

Finally, provide the SME with access to a content reviewer to make sure everything is covered clearly and effectively for participants who are not experts. With these tips in hand, trainers can help experts shine.

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### WHAT DO YOU THINK?

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