



HOW TO...

WORK WITH SUBJECT MATTER EXPERTS

As training designers, we are often asked to create training in topics that we aren't experts in. In order to do that, we need to work with subject-matter experts (SMEs) to harness their knowledge.

SMEs are experts in their field and can provide valuable insight into the industry trends, regulations, and best practices that should be included in the training. Additionally, SMEs can provide context around the material and, detailed (realistic) examples allowing us to create accessible and practical training.

That said, SMEs might suffer from the curse of knowledge and struggle to understand which parts of their vast knowledge are most relevant to meet the desired objectives. They will almost certainly have little idea about how best to bring that content to life in a meaningful way.

So a partnership is needed: Their specialist knowledge and our expertise in how people learn.

Here are my tips for getting the most from a subject matter expert in a training design project.

1. **Explain the design process** and make sure that the SME understands their role in it as well as yours. Put their mind at rest by explaining what they won't be expected to do! Send this out in advance of your meeting if possible to manage expectations from the start, or at least have an introductory call to cover this.
2. **Show respect.** SMEs may have been told to help you and even if they have volunteered, they are busy people so you need to make your time together count. Remember, this is a BIG piece of your work, a real priority. It's probably not to them.
3. **Explain roles.** They are the expert on the topic, whilst you are expert on how people learn. Effective training requires good content and good methodology. They will help define the content – you have to respect their greater knowledge there. You will decide how best to bring that content to life – they have to respect your knowledge there.
4. **Clearly explain the outcome** that is required and the **audience's starting point.** Keep them focused on this to help them to sift through their vast array of knowledge and experience. Be clear about the Minimum Viable Product to help stop them from overcomplicating things, or trying to turn everyone into experts, when they might only need to have an appreciation.
5. SMEs will probably suffer from the **Curse of Knowledge**, so you must use your consultancy skills and diplomacy to ask pertinent questions to ensure the content is accurate and relevant.





6. **Take an interest!** Approach it from the learner's perspective – what is interesting/useful and how can that be incorporated into the learning solution? Ask the sort of questions your learners would ask to keep it relevant, and ask them to explain any jargon or specialist terms they use.
7. **Get them to show you if possible.** Not only will you remember it better, but you'll be more likely to be able to use layman's terms when designing the training (or at least define the specialist terms easily)
8. **Explain and agree next steps** e.g. you will create a draft outline for their approval and then you'll work up the detailed materials. They will send you X and Y document. Manage their expectations about timescales and time they will need to commit.
9. **Agree deadlines and stick to them.** When will you get things to them? What EXACTLY do you expect them to do, and by when? Make sure that you fit in with their work commitments if at all possible.
10. **Clarify follow-up action.** You may need to reiterate that they only need to check that the content is correct and complete (for example) when you send a draft to them. You aren't expecting them to comment on the graphics you've included on your slides, the ice-breaker activity or proof-read materials!
11. **Allow plenty of time** for the subject matter expert to **provide feedback** and make suggestions, and help them by providing the necessary resources to ensure their contributions are comprehensive and complete.
12. Make sure to **thank the subject matter expert** for their help and expertise and offer to show them the final course and/or provide them with feedback when the project is completed.

