

1.1 | Apply: Work Effectively with SMEs

When asked what they like about their work, many instructional designers (IDs) state that they like learning new things. That's good, because while some ID professionals are experts on the topic for which they are designing instruction, many are not and must work with Subject Matter Experts (SMEs) to identify the applicable knowledge and skills. As a result, most job descriptions for ID positions include the phrase "must possess good interpersonal skills." The ability to artfully draw information out of another person – especially when ID is not in that person's job description – is a competency every designer should include on their professional development plan. Fostering a positive and effective working relationship with a SME is often a challenge.

Apply the following to develop a list of topics to investigate, questions to ask SMEs, and information to share with SMEs:

1. Determine how the SME views your project.

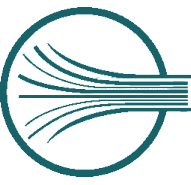
How interested is the SME in your efforts? How high up on their list of work tasks do you think it ranks? Were they told to work with you or is this project their idea? If their time with you was mandated, are they being compensated for the additional time and effort, or are they still expected to get their other work done by the original deadlines? Are you accomplishing something they were originally going to have to do, or does this project just represent additional work for them? Will the final instruction replace part of their job or make their job easier? The answers to these questions will enable you to approach the SME tactfully and honestly, gain their confidence, be considerate of their time, and be properly appreciative of their efforts. Your ultimate goal is to develop a good working partnership that benefits both parties and makes you both feel good about the task at hand.

2. Prepare carefully for your meetings with the SME.

Research as much as you can on your own, prior to meeting with the SME. Do not waste their time with questions that you could have answered yourself by reading available documentation. Go to the SME rather than forcing them to come to you. If you fear that your time together will be frequently interrupted by phone calls or visitors, suggest a neutral location near their work so that it does not require them to be away from work for longer than necessary. For the initial meeting, prepare a summary of your impression of the project goal and what you know about the topic, and provide it to the SME in advance, if possible. It is also a good idea to prepare a list of the questions you would like answered. If they have the time to read the questions in advance, they will be better prepared to optimize your time together. Otherwise, bring another copy of the questions along for them to refer to during your meeting. Prepare a similarly brief project status statement and questions for all subsequent meetings.

3. Explain what you plan to do and establish a mutually-agreeable review schedule.

Briefly explain the process you will pursue for the project, explaining the deliverables you will produce and the items the SME will review during each phase of the project. *Be sure to avoid ID jargon!* It is a



good idea to establish some initial deadlines for the deliverables and the reviews that will work for both of your schedules. Be sure to consult with the SME on the amount of time they feel is adequate for them to review each deliverable so you can factor that into your own deliverable deadlines.

4. Always be respectful of the SME's time, work, and opinions.

The amount of “buy-in” a SME has in an instructional design project will vary, so always be respectful and do not take their cooperation for granted. Seek to resolve differences of opinion in a diplomatic way, and be flexible and open to compromise. If a SME provides you with instructional items they have developed, be respectful of their work and try to incorporate it. Keep in mind that in doing this, you may need to “translate” the information into something more appropriate for the intended learner but be sure to tactfully explain why you have made the adjustments. The SME may also have strong opinions on the content and its presentation that conflict with your design. Again, be respectful. If the SME wishes to include a lot of technical or “nice-to-know” information rather than sticking to “need-to-know” content, attempt to provide choices and ask them to prioritize the information within the project parameters. If they wish to dictate instructional formatting that you feel is inappropriate, provide them with a clear breakdown of the costs and pedagogical issues involved, offer the option of obtaining the opinions of others close to the project (keeping in mind the political ramifications), and/or acquiesce gracefully if the SME's opinion carries more weight than yours.

References and for more, see:

- Davey, B., Elliott, K., & Bora, M. (2019). Negotiating pedagogical challenges in the shift from face-to-face to fully online learning: A case study of collaborative design solutions by learning designers and subject matter experts. *Journal of University Teaching & Learning Practice*, 16(1), 1-22.
- Moller, L. (1995). Working with subject matter experts. *TechTrends*, 40(6), 26-27.
- Morrison, G. R. (1988). The instructional designer--subject-matter-expert relationship in business and industry: Implications for professional training. *Journal of Instructional Development*, 11 (2), 24-27.