

Program design and development

Developing training programs

14-240 Working with subject matter experts

Trainers frequently have to create training programs on topics that are not in their main areas of expertise. They therefore have to work with subject matter experts (SMEs). The SMEs know the content and understand the work environment, so the creation of the training program depends on their time and the commitment they make to the project.

The challenge is that they may not have a lot of time to spare, and they may not have a good understanding of how to work with a trainer to design a course. It is important that a good working relationship is established with them. Here are some guidelines for trainers to work productively with SMEs.

1. Consider the SME's perspective.

One of the best ways to save time and money on your project is to establish clear expectations. Like you, the SME typically doesn't have a lot of time. Many times, they're not even part of the project team; they are just told to give you information. Working with you is a diversion from their normal responsibilities and a drain on their limited time. You can control the time requirements by setting clear expectations that include agreed-upon timelines and action items.

2. Acknowledge the SME's contribution.

People like to be recognised. A great way to get the SME's attention and support is to send an appreciative email to the person's manager and copy in the SME. Doing this will help you when you need some of the extra time from the SME for reviews or follow-up.

3. Establish your mode of communication with the SME.

Offer various options to SMEs for supplying information, such as email, web conference, fax, phone, regular mail, and contributions to an online learning system.

4. Find out what needs to be learned by employees.

The SMEs are the experts, and they may know ten times what needs to be learned by employees. They may feel compelled to give far more information than is needed, and to explain far more theory than is relevant. The trainer has to first listen to the SME's views, and then have a conversation focusing on what employees really need to know in order to perform their function. (eg Is this part necessary, or just nice to know?)

5. Help SMEs comprehend the student's point of view.

You want the SME to focus less on the information and more on how to make the information meaningful for employees. Focus on how employees will use the information, so you can design activities around that.

SMEs are generally not experts at learning theory, so you need to communicate to them what it is that makes the program learner-friendly – consider the amount of information, sequencing of information, activities, quizzes, visual materials, and notional time to allocate for the course.

Instructional design is about crafting a learning environment that produces successful results. This means more than just converting a reference document to a PowerPoint slideshow, or a PowerPoint slideshow to an online format. Success comes when you can connect the course content to the learner's world so that the learner is able to do something new or better.

Show the SME examples that demonstrate how the learner learns more through interaction. Run through an activity with them, and incorporate an activity into the design process at a SME meeting, or enlist a SME with facilitation experience as your advocate. The last option can be particularly effective, as someone who has experienced the thrill of a dynamic learning environment sparked by a good activity can convince peers of their value.

6. Consider the SME's motivations.

The SME may wish to:

- achieve recognition and prestige
- wield influence on the profession or the company
- obtain and display expertise
- serve the profession by aiding in knowledge transfer
- network and compete with peers.

Understanding SMEs' motivations can be helpful when various approaches to training content are clashing. SMEs will more likely share their expertise when they consider the trainer to be a partner rather than an overseer or an underling.

7. Establish your own role in the project.

The trainer/instructional designer and the SME complement each other. The SME may or may not have a general sense of what works and what doesn't in training, but if they are familiar with a course they are likely to simply want to copy what they're familiar with, whether or not it was effective.

Present some good examples of what you think will work. By showing them examples of different types of learning design, you will be able to shape their understanding and help create expectations for a different approach.

8. Manage the relationships.

A critical facet in managing your instruction design project is managing relationships with the people who support it. If you want your project to be successful, you need to establish a good working relationship with your SMEs. They play a key role in providing and validating the content you need, and this will influence how you design your course. But whether the course succeeds or not depends on how well you can work together to produce a program that is accessible and engaging for learners.