

## WORKING WITH SMEs

- A Pass Educational Group, LLC has found that working with subject matter experts, or SMEs, is essential to developing courses that lead to learner success. The SME is considered an authority in a particular content area. He/she is identified early on in the project to clarify content as well as to provide support to the instructional designer throughout the development of the course.

**Think of the SME as the “go-to” individual** for adding substance to the outline or storyboard created by the instructional designer.

The SME could be an accountant, HR professional, elementary school teacher, or professor of philosophy—it all depends on the course content area. The SME knows his/her material and the instructional designer knows how to best present it. The SME and instructional designer must combine their expertise to develop material that best serves the learner.

The project manager plays a vital role in establishing clear communication and ensuring development guidelines are met; he/she also fills the shoes of other team members when needed. Below are some “best practices” that all parties should keep in mind when working with subject matter experts.

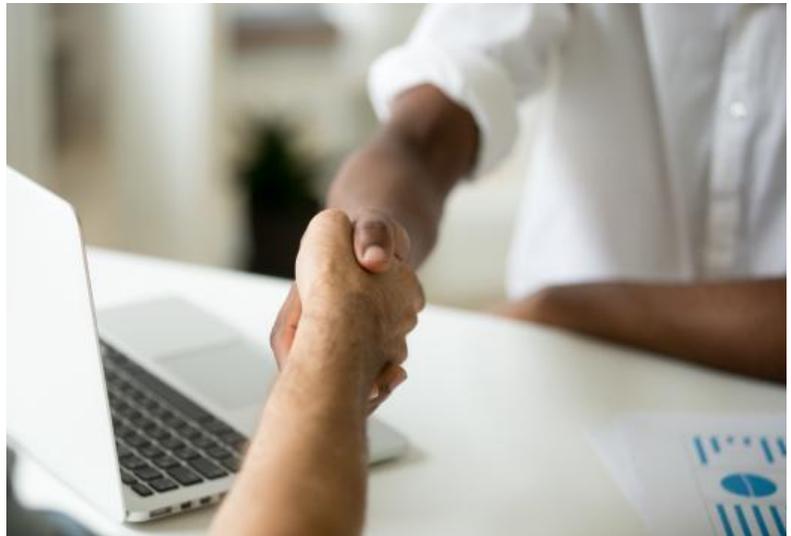
### BEST PRACTICES

#### 1. IDENTIFY CLEAR ROLES

The subject matter expert has a wealth of knowledge and may have an idea in his/her head of how best to present it. The instructional designer is an expert in how to design the content in a way that is the most beneficial to learning. Identifying clear roles throughout the workflow will make it easier for both the SME and the instructional designer to understand what is expected of them. These roles also acknowledge the expertise that both the SME and instructional designer bring to the project.

#### 2. BUILD RAPPORT

The key to the instructional designer and SME getting past not knowing one another’s working style is through developing rapport. Research from the University of Georgia explored key competencies that are needed in order to succeed as an instructional designer. One indicator found from experienced instructional designers was the ability to build rapport with their SMEs. This was achieved by understanding



the SME’s work schedule outside of the project, their role in the design process, and the other responsibilities they may be juggling with their full-time jobs. If the instructional designer goes into the design process with all these things in mind, it will be easier to develop a good rapport.

### 3. CREATE A DETAILED WORKFLOW

You should lay out clear expectations in the kick-off meeting between the client and the development team. The team can list short-term goals for the project and tweak them if necessary to ensure that everyone is comfortable with the workflow and schedule.

### 4. BE OPEN TO FEEDBACK

Both the SME and instructional designer should be open to feedback from each other throughout the process. This feedback helps the content evolve and improve, and it helps develop that crucial rapport between the SME and instructional designer. The project manager can assist with communicating this feedback and ensuring that both parties are getting their needs met.

### 5. MAKE THE SME PART OF THE COURSE EVALUATION

The evaluation cycle runs from the initial analysis of the material to the final team evaluation once the course has been created. Getting the SME's input early on can catch content mistakes and decrease rework. Having the SME as an active part of the evaluation also helps ensure that the content is accurate.



Throughout the curriculum design process, it is natural for there to be some resistance to new ideas from both the SME and the instructional designer. Either one may envision the future of the project and want to change it into something more familiar. In order to have a smoother working relationship, the SME should be an active part of the design process. Opening up the dialogue from the beginning on how to improve the material will lead to better communication. Below are some pros and cons of working with a SME.

#### PROS

- Field experience that greatly enhances existing research
- Ensures accuracy of the content and knowledge of current trends
- Ability to create activities that require higher-level thinking such as developing real-world, scenario-based tasks

#### CONS

- Unfamiliarity between the instructional designer and SME as to working styles, leading to unclear timelines and expectations
- Preconceived notions of how the material should look and resistance to using the content in new ways
- Difficulty meeting frequently if the SME works full time

Don't let the cons intimidate you—with the right methods, you can avoid them in your project. These “best practices” can assist you with any issues that may arise. Working with a subject matter expert can be challenging, but properly utilizing their expertise is very rewarding. A relationship forms that is based on open communication and focuses on a common goal: serving the learner.

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