



a **limbic**|checklist

# How to be an **Effective SME** checklist

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What makes an effective **Subject Matter Expert**?

The Subject Matter Expert is crucial to getting the content right – but doing the role is not always an easy task.

This LIMBIC checklist is for the SME. It covers off what a SME should know, what a SME should do, and guidelines on how a SME should do it.

<p>Stage → Core Area ↓</p>	<p>Plan (what you need before you start)</p>	<p>Stage → Core Area ↓</p>	<p>Definition (clarifying your needs and solution design)</p>	<p>Stage → Core Area ↓</p>	<p>Development (turning vision into reality)</p>
<p><b>The SME profile</b></p>	<p>Your SME: most important stakeholder in developing content.</p> <p>The SME role is a challenging one and an SMEs can find themselves in the role for all sorts of reasons. So it's important to understand and provide support if you can – or get support if you're an SME.</p> <p>To get an understanding of the SME you are or that you're going to be working with it helps to ask some key questions in advance :</p> <ul style="list-style-type: none"> <li>• Supporter or not of initiative?</li> <li>• Views on e-learning?</li> <li>• Influence level?</li> <li>• Impact on them?</li> <li>• How would they like to work?</li> </ul> <p><b>Different working models if you're a SME</b></p> <ul style="list-style-type: none"> <li>○ Some SMEs will want (or over time, need) to develop content - they'll need training, guidelines, and support</li> <li>○ Some SMEs will be interested in being involved, but prefer to be facilitated in delivering what they can</li> <li>○ Some will prefer vendor to develop content and they'll review it</li> </ul> <p>The SME role is essential because of expertise - but more often than not rather than a careful selection process, the person doing it will simply be the 'person who knows X'.</p>	<p><b>Treatment</b></p>	<p>This is all about what the learner's experience will be:</p> <ul style="list-style-type: none"> <li>○ What's this course going to look like?</li> <li>○ How's the content likely to fit?</li> <li>○ Is it a blend (e and traditional face to face)?</li> <li>○ Where will materials fit in to the proposed design? (facts, scenarios, anecdotes, etc.)</li> <li>○ Will it cover the <b>needed</b> content? (<b>note:</b> not EVERY DETAIL POSSIBLE!)</li> </ul> <p>Clarify the vision/ the solution. Best way is to see examples!</p> <ul style="list-style-type: none"> <li>○ Similar examples if the vendor's done that before, <b>or</b></li> <li>○ a 'walkthrough' - these are mock-ups/comps (simple static screen examples put into a flow, say a PowerPoint, that let's you get a feel for the course).</li> </ul> <p>Things don't need to be a perfect match to the design - close enough is fine for this purpose.</p> <p>Get your vendor to show how this treatment fits in with the SME role:</p> <ul style="list-style-type: none"> <li>○ Get them to work backwards from finished course to 1st day of SME involvement - and show what the SME role did, namely: <ul style="list-style-type: none"> <li>○ the deliverables that the SME contributed to</li> <li>○ how they did it</li> </ul> </li> </ul> <p>Doing all the above will save time for everyone involved and minimises surprises later on in the project.</p>	<p><b>Base Content</b></p>	<p>There's got to be some form of content somewhere!</p> <p>Worst case scenario: it lies <b>only</b> in the SME's head. Otherwise, the following all help:</p> <ul style="list-style-type: none"> <li>○ 'Base' materials – naturally all up-to-date and accurate. What do you have to hand?</li> <li>○ Diagrams/ Tables/ Flowcharts</li> <li>○ Quiz/ assessment questions</li> </ul> <p>Sources for materials:</p> <ul style="list-style-type: none"> <li>• Existing collateral: manuals, intranet, brochures, internet, etc.</li> <li>• Workshops/training events</li> </ul> <p><b>Things to ensure:</b></p> <ul style="list-style-type: none"> <li>○ Take vendor/ designer through materials – <b>do not</b> simply hand over documents!</li> <li>○ Clarify the Learning Objectives, or the GOALS of the programme - what will learners <b>be able to do</b> at the end of it all?</li> <li>○ Scoping/ structure documents together with the vendor - this way a SME will attain and describe the detail required</li> </ul>

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<b>Roles &amp; responsibilities (vendor/SME)</b>	<p>A SME's role can be daunting/ challenging! The SME is the gatekeeper of content: relevance and accuracy.</p> <p>Naturally responsibilities will depend on the working model taken, but a lot will be the same.</p> <p>Put concrete dates <b>in your diary!</b></p> <p><b>Core:</b></p> <ul style="list-style-type: none"> <li>○ SME to focus on the content, not the project. Don't focus on e-learning or the project (unless you're also the Project Manager),</li> <li>○ Unless you're going to be doing this for a living, or doing in-house production <b>do not write the materials!</b> Work with the vendor to do that. It's likely it will just drag on to get right in terms of tone, pace, learning- and why bother? That's what the vendor is for!</li> <li>○ Work collaboratively with the e-learning designer/ vendor , and with your learners in mind - not in a vacuum</li> <li>○ Be aware and put in the diary the days required for the SME role to develop content - it can be daunting!</li> </ul> <p>(This can burst days on the project when the focus on content isn't adhered to!)</p> <ul style="list-style-type: none"> <li>○ Check that holidays and other events do not coincide with SME required days</li> <li>○ Ensure regular communications (calls, meetings), especially regarding 'sign-off' to stay on schedule</li> </ul>	<b>Time commitment</b>	<p>Time commitment: <b>minimum input</b></p> <ul style="list-style-type: none"> <li>○ Participate in being interviewed/ taking part in content workshops</li> <li>○ Be available to be observed</li> <li>○ Describe realistic job scenarios</li> <li>○ Review e-learning storyboards/ script/graphics if part of the development process</li> <li>○ Test the programme</li> </ul> <p><b>Maximum</b> input? Could be huge... up to you and whoever, but one thing for sure: <b>CLARIFY IN ADVANCE</b> so you know who's doing what.</p>	<b>Enhancing content (Interviewing &amp; questioning)</b>	<p><b>It's about your learners</b></p> <ul style="list-style-type: none"> <li>• Hold focus groups/audience samples within your organisation</li> <li>• Talk: ask recent learners how they learnt</li> <li>• Observe: get out there and see people doing it</li> </ul> <p><b>It's about asking the right questions</b></p> <p>Ask the right questions to elicit the detail needed for others to perform at the expected level of competence:</p> <ul style="list-style-type: none"> <li>• Identify those questions up front</li> <li>• Offer examples of the type of detail you're looking for</li> </ul> <p><b>Five key questions</b> are really spot on (Roger Schank's book <i>Lessons in learning, e-learning, and Training</i>, Pfeiffer, 2005)</p> <ol style="list-style-type: none"> <li>1. What are your people having trouble doing properly? (think 80/20)</li> <li>2. Give me stories examples of what happens when people don't do things right</li> <li>3. Why do people make those mistakes?</li> <li>4. What are the key problems right now?</li> <li>5. What are the key things employees need to know <b>how to do</b>?</li> </ol> <p><b>It's about the mistakes</b></p> <ul style="list-style-type: none"> <li>• SME says what goes wrong, where people make mistakes, and where there are performance gaps</li> <li>• Ask recent learners what goes wrong, where people make mistakes, and where there are performance gaps?</li> <li>• What made learners 'get it'?</li> </ul>

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					<p><b>It's about the challenges</b></p> <ul style="list-style-type: none"> <li>○ Why these facts, concepts, procedures, or skills were challenging?</li> <li>○ What happened that got them past the challenge?</li> <li>○ What facts, concepts, procedures, etc. were challenging at first?</li> <li>○ And again... what eventually made learners 'get it'?</li> </ul>
<p><b>Expectations</b></p>	<p>An SME needs to have expectations clearly set. (Guidelines at each key stage.)</p> <ul style="list-style-type: none"> <li>○ If you ARE the SME, or if a SME is part of your team, then don't forget there's still the small matter of the day job! <b>The best experts are typically time constrained!</b></li> <li>○ 'Now you're the SME, what next?' - what will they actually do/ experience (e.g. design solution, scripting etc.)</li> <li>○ What's it leading to?</li> <li>○ What feedback from you is sought by a vendor?</li> <li>○ How long will each bit take?</li> <li>○ When things need to be back?</li> <li>○ Who to contact if you have questions?</li> </ul>			<p><b>Additional ways to get to content</b></p>	<p>This area's got some rich research in itself! For example, consistency, stability, repeatability, and accuracy of the methods used and the information gained.</p> <p>There are definitely advantages and disadvantages of the different ways to gain knowledge about 'how' and 'what' people do.</p> <p>And these methods can change whether used, for example, for certain types of subject matter domain, or for eliciting the knowledge of individuals at a specific skill levels (definitely different when dealing with novices and experts.)</p> <p>Our advice: use a NUMBER of these things to get to the real heart of things:</p> <ul style="list-style-type: none"> <li>○ Print media</li> <li>○ Questionnaires</li> <li>○ Observation</li> <li>○ Critical decision method A probing interview of someone who has critical info and prior knowledge of things. - check it out here: <a href="http://www.slideshare.net/ESS/critical-decision-method-cdm/">http://www.slideshare.net/ESS/critical-decision-method-cdm/</a></li> </ul>
<p><b>Preparation</b></p>	<p>Look at how you can do it successfully, with little pain</p>			<p><b>Reviewing</b></p>	<p><b>SME review checklist</b></p> <ul style="list-style-type: none"> <li>○ Put aside at least ½ day to review 1hr's</li> </ul>

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	<ul style="list-style-type: none"> <li>○ Remove concerns</li> <li>○ Work around your commitments/ time</li> <li>○ Prevent anxiety</li> </ul>				content <ul style="list-style-type: none"> <li>○ Clarify HOW you're to feed back (e.g. edit text directly, amends print-outs, spreadsheet or some other reporting tool)</li> <li>○ Is the content still accurate following any reshaping into learning? (Remember to focus on any lost/confused meaning, not rewriting)</li> <li>○ Think once more: is the instructional content relevant to the target audience?</li> <li>○ Do NOT obsess with words, or you'll forever iterate with little or no ROI</li> <li>○ Are examples or scenarios in the material realistic and representative of day-to-day situations?</li> <li>○ Does the media enhance, not detract, from the content on each screen?</li> </ul>