

# Working with Subject Matter Experts

An ACS: Expertise In Action™  
White Paper



---

**Affiliated Computer Services, Inc.**  
**ACS Learning Services**

**June 5, 2008**



expertise in action™

## Effectively Working with Subject Matter Experts

We all understand that “SMEs”, subject matter experts, are vital to the success of any learning program or development initiative. But we also know it is impossible to keep our design and development projects on schedule and on budget when we can’t get the information we need, when we need it.

The notion of transferring what SMEs know to others is as old as learning itself. In businesses, SMEs have special, in-depth knowledge of one or more business areas. This critical knowledge, when shared with others, can significantly elevate performance within the organization. Undertaking a learning initiative can be the conduit to transfer that knowledge.

But the path to capture what SMEs know and transforming it into an effective learning program is not an easy one and typically requires significant, highly focused commitment on the part of each SME. A core challenge is that SMEs typically have a “day job” beyond their SME roles. How do you manage the learning development effort while minimizing any disruption to their “day job?” Having successfully created over 50,000 hours of custom content for our customers, the ACS Content Development team has a well-defined approach that effectively manages the learning development process, including leveraging SME knowledge while minimizing their time. By extending our content development tools, processes, and techniques to their SMEs, some of our customers have observed that SME time can be reduced by as much as 50 percent over prior experiences.

## Getting the Right Expertise for your Learning Content

Subject matter experts (SMEs) play a pivotal role in any learning initiative. Collaborating with ACS learning professionals to provide relevant and accurate content, SMEs are part of a powerful team that delivers an effective learning experience within an organization. A key role of the ACS Instructional Designer is to engage the SME and build a relationship to foster participation. A few quick tips are:

- Motivate busy business leaders to see value in the learning initiative
- Engage active SME participation in a clear, established project methodology
- Adapt schedules and processes to accommodate very busy people
- Provide thought Leadership, in both our craft and industry knowledge to gain credibility and trust



- Ensure governance and the integrity of courseware, with plenty of time for review and editing
- Ensure quality design that provides the business results our customers seek and a project the SMEs can be proud of.

SMEs typically are recognized among their peers as "experts" and are frequently in demand within their organizations to assist with complex issues. Though rarely trained in instructional design, some SMEs may have been specially trained to serve in the role of a SME for the organization, such as an application or systems specialist. Other SMEs might have evolved naturally into the role due to the job they have performed over time, such as a process expert or a company policy expert. Regardless of the way SMEs have moved into the role, they bring day-to-day experience to the subject matter – both content and its context for the business.

Often they have “war” stories, case studies, best practices, tips and/or “tricks-of-the-trade” that can be shared with others to improve knowledge exchange and transfer. But to successfully transfer this knowledge in a fashion that allows content teams to meet the quality and schedule expectations of our stakeholders can be a challenge. Here are three key ways that ACS design professionals have developed to maximize the value of subject experts and meet deadlines.

## Creating a Value Added Partnership

While the SME role provides true “Win-Win” value for both the organization and the SME, the effectiveness with which one engages and interacts with SMEs can make or break any learning development initiative.

Through teaming, ACS fosters true collaboration with each customer in the design, development, and implementation of learning. Our customers span many industries—commercial construction, professional services, technology, pharmaceutical, financial services, manufacturing, distribution, and retail. The learning initiatives that we support include employee training and certification, onboarding, product and service training for distributors and channel partners, new technology and software applications training, and compliance assurance.

## Establish Clear Role Definition and Clarification

Managing SMEs' time and expectations starts with clearly establishing their role during the development initiative they are supporting. By doing that, SMEs not only know what they are supposed to do, they also know when and how much time each of their assigned tasks will require, so they can plan their schedules in advance. While their tasks and level of participation may vary based on the type of learning initiative that is to be developed, clarity concerning their specific tasks is essential.



## Communication, Communication, Communication

Anyone who has worked as part of a team knows that close communication among team members is the engine that drives project success. It stands to reason that effective communication between the ACS development team and each SME is critical. The ACS team uses four communication interventions with customer SMEs: Design Sessions, Deliverable Reviews, Project Status Reviews/Milestones, and Online Community.

SMEs are vital to the success of any learning development initiative. With many years of experience in developing synchronous and asynchronous learning ACS has developed effective practices as part of our design methodology (IDEAL) that include comprehensive yet practical tools and techniques to help manage and reward timely engagement by subject experts. By creating and implementing effective practices that include comprehensive yet practical tools and techniques, we have found that the experience of each SME is rewarding for them and their organization, causing minimal disruption to their “day jobs” while keeping each learning development initiative on track toward a successful launch.

ACS Design Guideline	Description	SME Role
Performance-Based Objectives	Learning objectives are tied to on-the-job performance requirements—they are measurable and they align with customer business outcomes.	<ul style="list-style-type: none"> <li>• Co-develop the objectives and provide critical input and business insight as each objective takes shape and the specific performance criteria are defined</li> </ul>
Meaningful Content	Content is developed and refined until it provides the essential knowledge and skills for each learner to use on the job.	<ul style="list-style-type: none"> <li>• Provide accurate and current content source materials where and when needed</li> <li>• Actively participate in content interviews and discussions</li> <li>• Provide thorough, thoughtful content reviews throughout development</li> <li>• Assist in setting priorities on the most essential knowledge and skills</li> </ul>
Relevant Application	Learners understand why the training is important and are engaged in solving real life problems and in practicing job-essential skills.	<ul style="list-style-type: none"> <li>• Act as “the voice of the business” by helping to answer, “Why is this important to learners?” and “Why is it important to the organization?”</li> </ul>



Learner-Centered Experiences	<p>Respect for the different ways that each of us learns is essential for results-oriented learning. We strive to create learning environments that are engaging, easy to use, interesting, and conducive to different learning styles. Learners may be able to choose what, when, and how they want to learn new knowledge and skills. Engaging graphics and media and dynamic interactions and scenarios—such as case studies, simulations, learning games, and hands-on practice—motivate learners and improve their chances of retaining and effectively using their new job-related skills.</p>	<ul style="list-style-type: none"><li>• Provide key content insights, such as real-life examples and “tricks-of-the trade” that serve as the catalyst for addressing different learning styles and motivation</li><li>• Provide a reality check on the characteristics of the learning population and learning activities that will resonate well with the learners</li></ul>
------------------------------	--	---

