PODCAST TRANSCRIPT FOR ELC 065: PRO TIPS FOR WORKING WITH SUBJECT MATTER EXPERTS (SMEs)

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Connie: Hello, learning people. Welcome to episode 65. Subject matter experts or SMEs are usually an indispensable part of a learning development team. Even though they are on the same team, however, the SME and the learning professional may be living in different worlds. How can we build good relationships with subject matter experts and what can we do when issues and obstacles emerge?

            In this episode, I speak with two very experienced learning professionals who answer these questions, Dawn Mahoney and Diane Elkins. They offer insightful strategies and techniques for successfully managing issues with SMEs.

            Dawn, CPTD, is the founder of Learning In the White Space, a boutique consultancy devoted to all things learning. She also writes on learning topics and is the author of the "Last Word" column for *Training Magazine.*

            Diane Elkins is co-owner of Artisan Learning, where she helps companies, non-profits and government agencies get up and running with e-learning initiatives. She has been in the training and development field for 20 years. Diane is the co-author of the popular eLearnngi Uncovered book series and is a regular contributor to the ATD Learning Technologies Blog. You can find the transcript and show notes at: theelearningcoach.com/podcasts/65.

            Here's our conversation.

Connie: Dawn and Diane, welcome to The eLearning Coach Podcast. It's so good to have you.

Dawn: Thank you, glad to be here.

Diane: Same here.

Connie: You have both presented about a topic that seems to perplex a lot of people, and that is how to best work with subject matter experts. And before we get started on different tips and techniques that you can provide, can one of you define the role of the subject matter expert, as far as instruction design goes?

Diane: For me Connie, the big difference for me is that the subject matter expert is the advocate for the content. I'm the advocate for the learner. And it's amazing how often those needs are different. So subject matter experts are often selected because of their expertise. That's why they're called subject matter experts. But extensive, deep, ingrained expertise in its raw, unfiltered form, is not what a newbie needs. And so, someone needs to be the filter. Somebody needs to be the translator between what a SME knows and what a learner needs.

Diane: Some SMEs are able to do that themselves, but many aren't and they don't know it. And we've all been in presentations with a subject matter expert with great passion and knowledge, bores and confuses their learners. And I don't think that's what they did that morning is get up, have some cereal and say, "I'm so excited. I get to go bore people. I get to go talk over people's heads. I get to confuse the heck out of people, waste their time, and make them wonder why they came." That's not their goal, but sometimes it's their impact.

Diane: And I think we have a unique detachment. I often tell people that my ignorance on this topic is my greatest gift to the subject is that I can get around that and help people tactfully see their blind spots. I was working on a project once, or a consulting, for a company that had to do training on landmine safety. Now personally, if I have to go to a class that involves landmine safety, I would be like, "Get there early, sit in the front row ready with my notes." I'd be a committed student, but they were getting all this feedback that it wasn't helpful, it was boring.

Diane: And so, I asked the guy who taught it. He said, "I love this class. This is the most awesome class. I mean, it's fascinating stuff. It's my favorite one to teach. We spend the whole first hour talking about the history of gunpowder. I mean, we go all the way back to the Chinese up through modern day. It's fascinating stuff." Yeah, if you're a History Channel junkie, but not if you're standing on a road in Afghanistan trying to decide if you can go forward safely. And it's easy to joke and just go, "Oh my gosh, what an idiot. That's so obvious." But we all have those blind spots, and I think that's our role is to help with those blind spots.

Connie: That is so true. Dawn, did you want to add something?

Dawn: I was just going to say what I see the ID's role as, and we are partners to the SMEs and subject matter experts, and docents of the information they provide us. But also, we're partners to the business and to the stakeholders in that we act as the filter. Taking things apart and putting

them back together from each of those partners, because they come from different perspectives and it all has to work together in the end. So, I feel like the business need piece of it and the SME defining what success looks like, and what barriers they might encounter, are all key elements of what we bring to the table to make the SMEs shine and the people that do the work shine.

Connie: Between the two of you, that's the best definition of the role of the subject matter expert and instructional designer that I've ever heard. And I do want to say, as far as being ignorant, I actually had a physician say that about me in front of an entire room of physicians. And what she said was, "You know what the best thing about Connie is? She doesn't know anything." And I wasn't sure whether to be happy about that, if that was a compliment, or not. Anyway, let's move on.

Connie: If you are ever in a position, or if any of the listeners are in a position to choose or recommend a subject matter expert, prior to the kickoff meeting, what qualities would you look for? What would you recommend? Dawn?

Dawn: That is an easy one for me to answer, because most of the time I am in my previous past life, and up till this point, I've been creating learning content that is very job and task focused. Whether it's system training, or on-the-job training for sales, et cetera. And so, talking to the people who do the work, I really want to talk to some people that are doing that right now. I also want to talk to people that have maybe recently been promoted from doing the work. But then I also want to talk to the people who manage performance metrics. And I also want to talk to either the managers, supervisors. The people who are doing the work, I want to talk to the people that are managing them, so I can get a well-rounded conversation and dialog going about what does success look like. What barriers exist that I maybe didn't hear about from the leadership team when they asked for this significant business metric to change, et cetera, through give those people over there training.

Dawn: And it's astounding when you talk to the people who are doing the work. They say things like, "Well, they should come and walk a mile in my shoes, because they want us to do X, Y, or Z, and we don't even have the equipment, or the software, or the whatever to do X, Y, and Z." So, it opens up a whole other set of conversations. So, I try to not take the key stakeholder's word only.

Connie: Good advice.

Diane: I agree with all of that. And then I also look for some personal characteristics, if I can. I like a talker, someone who says words and whole sentences. Sometimes you get the monosyllabic SME and you just can't get anywhere. Someone who has time. I mean, that's a huge issue, unfortunately, that your subject matter experts are often your most in demand resources. I do a lot of projects where we're converting instructor led training to eLearning. And so, it's great to have someone who's taught the course a million times. But it's also great to have someone who's never taught it or, at least, was not involved in its development and it doesn't feel like their baby.

Connie: That is true. If you've worked hard on a project, like a subject matter expert may have, if they do training, they can be somewhat territorial. And I know this happens also in higher education, when instruction designers are working with faculty members, they can often feel this is my subject, this is my course, you really can't tell me anything that'll help, just put it online.

Diane: Yeah.

Dawn: Right.

Connie: And it's understandable. I certainly like to have empathy for a SME, and I would love to have subject matter experts on the podcast sometime saying what they are looking for in an instructional designer. Diane, what have you found to be some of the best ways to ensure you can have a good working relationship with the SME from the very start?

Diane: One of the things that I like to do, especially if it is a conversion project, or an instructor led to eLearning, or something where they already have a fair amount of materials, is I want to very delicately find out what their role is on that existing project, and what their level of ownership is because it really is going to change my tact. If their baby is ugly, nobody wants to hear that. And so, I am going to tackle that so much differently if it is their baby versus someone else's baby, versus they know it's an ugly baby.

Diane: I did a project years ago for the Red Cross. It was a three-hour webinar on how to fill out a form, and it was almost all PowerPoint bullet points. It was awful. And the subject matter expert was awesome. He was passionate. He believed in their mission. This was their disaster services team. And fortunately, he knew it was the wrong way to do it. He just didn't know the right way. And so, we could have really open and honest conversations.

Diane: But then if you get a SME who goes, "Why are you asking me all these questions? I have all the content. Why can't you just use my slides? It's all there on slide seven." Well, I know I'm going to have to take a completely different tact, and a completely different approach to make sure I can do what I need. So that, to me, is one of the most important things, is to find out can I go at something straight? Can I have a little fun with it? You pick up on that personal dynamic earlier. I was on some calls recently with some subject matter experts and one of them kept breaking one of my rules about using the word know too much, K-N-O-W. And we got the point where I could say, "Frank, I'm going to fine you two bucks every time you say it," but I can't do that with other folks.

Connie: Right.

Diane: So, you really need to read the room, even if it's just reading a virtual room, to find out what the right facilitation style. And then the other thing that I then do is sometimes I have to manage expectations, if they do want to hold on tightly. Because if they're going to hold on tightly to their existing slides, they don't need me. I mean, they need me, but if they're going to fight me every step of the way, and I don't want it to be a fight. I want us to be on the same side, working towards the same goal. And so, I do things like I talk about the new medium.

Diane: So, I'll say, "Oh." This is my three-step process. I thank them for all the work they've done. I talk about how they're great raw materials. And then I talk about the new medium. So, I say, "Oh, thank you for sending me all those slides. I've looked over them, such great raw materials for me to look at. Now, as we translate this into a new medium, I've got some questions for you." And that way it's not as much of a fight. I don't want a fight, but I have to do my job. Otherwise, let's just import their slides into Storyline, add a boring multiple-choice quiz, and go home. You don't need an instructional designer with that.

Connie: What about you Dawn?

Dawn: I echo, and more, everything that Diane said. Something that comes to my mind is when I was an internal instructional designer versus working with clients at a client level, and it's easy to forget that the internal, you fight different battles so to speak, because you probably know the people. You know the institutional knowledge, the organizational culture, which are both help and hindrance. And then working with clients, I'm not always able to be there for the initial conversations I have found for whatever reason. But I do always try to, even if I don't call it a kickoff, I try to have,

at least, a preliminary conversation with everybody that's going to be involved and talk about my role. Why I've been brought in. How I see their role. How I'm seeing communication with each other going as smoothly as possible.

Dawn: And asking them to let me know what works for them, because if there are people walking the shop floor, or there on call center wearing a headset all day, they're probably not going to pick up my phone calls, for instance, so email or some other method is going to be better ways to communicate with them and try to just build a communication plan. But clarifying roles and responsibilities and making it known that they are a key element to the project's success, both in milestones along the way, and the ultimate success. And explaining what success looks like with respect to not meeting deadlines, not turning content around, what the downstream effects of that are, because my experience has been people have been voluntold to do these things, and they usually have zero understanding of what their commitment is going to be.

Dawn: Whether it's a time commitment, a stuff commitment. Whether it's old content, new content. And I have to say the hardest people sometimes to work with in this realm are the people that do the work we do, and they've brought us in because they want to switch gears, or they're already overloaded, but they don't want to let go. And so, sometimes our own fellow compatriots in the learning world are sometimes our most difficult challenges.

Dawn: But the biggest thing I want to say, and just never want to lose track of is, right up front, and continuously along the way, I want to give praise and thanks out loud, verbally, and be gracious, and let people know that I realize this is adding onto their regular responsibilities. Never are people given extra time to be my subject matter experts. It's always over and above their regular "day jobs." So, reminding them that I know that, and I want to work with them to the best of my ability is important. But also, I know that anyway that I can elevate and make their contribution, and my appreciation as visible to their leadership and management the better. And continuously doing that along the way, how much more smoothly things will go.

Dawn: And I try to do that early and often, because when I have to have those "fights" like Diane brought up, then we've established some baseline for understanding. That's my goal.

Connie: Right. And boy, did you bring up so many great points. We have to educate them. We have to have an empathic relationship with them, so our appreciation, be grateful for them. And somehow, also, be able to build the kind of relationship where we can tell them no sometimes. I mean, it's pretty tricky, but it's just like many, many work relationships. You have to give some, take some, and...

Dawn: Well, and they have to trust us, and they don't trust us at the outset, so we have to do all the things and even more of the things than we thought in order for that trust filled relationship to be there. So that when I may end up digging my heals in, I know we can't have red text all over everything and here's why, or light gray is not the best use of fontography. Then we've established some baselines for communication, but trust is at the heart of it all.

Connie: It really is. And also, sometimes it's just confusion. They could be working in something that's so different; they don't even know what eLearning is. So, one more thing I would add is showing them concrete examples of what you may be doing. You don't even totally understand the performance problem yet. Some things that you have done in the best, just so they get some idea, so that they can visualize something in their minds, because you might be working with someone who literally has no idea what you're up to.

Diane: Yeah. I had a situation like that once. I was working with a subject matter expert. My client wanted me to convert an instructor led to eLearning and their instructor led was done by a consultant. And so, that consultant was one of the subject matter experts. And she didn't like my very existence. Me, personally, on the project, eLearning in general. This was, maybe, seven years ago, so it wasn't as mainstream. At one point, she basically looked at me, with the client right there. I forget her exact words, but between the words and her tone, it was very clear what she was saying, "Hey Diane, how in the world could your measly little eLearning possibly recreate all the fabulousness that I bring to a classroom?"

Diane: And I had observed her class, which was good. And I said, "Oh, so remember this activity where you do this, and they were talking to their person at their table and sharing this experience. Well, in the eLearning what we could do is we could ask this question," I told her the question, "and they can type in their answers. And then we could show a box and they can compare to what an expert might say." And she just lights up, and she goes, "Oh, they can type things in?" She had just only ever

experienced bad eLearning. And so, we can have the same frame of reference the more we can work together collaboratively.

Dawn: Yeah, that's great, good story. You never know what's going to unlock the magic door. I bet that was a big surprise and ah-ha moment.

Diane: Yeah.

Connie: Now, the reason that experts are put on your projects are because they're experts. So, they are busy. I love that word, voluntold. They are often assigned to your project. They did not volunteer. And so, they've just put your project on the back burner. What are some of your tips for ensuring that they can meet deadlines, give you reasonably timed turnarounds, and just commit the needed time to your project? Dawn?

Dawn: I try to do the work up front, to the best of my ability, which is providing a document, an email, whatever, some communication vessel that gives milestones with dates and times on them, and a little bit of information on what slows down that process. We'll have had a conversation, even a text message if we have to, but somehow or other. But I try to do that work up front. I also find that mini-milestones matter, because if you can chunk it down to smaller bits and bytes, people seem to not be quite so overwhelmed. It isn't always possible, but I try. And then I like to celebrate achievement with them, especially up front and early in the process. Again, trying to put deposits in a proverbial trust bank, celebrating milestones, and letting people know how much you appreciate that they made the deadline. They were early and it was good stuff. We all need that in our day-to-day.

Dawn: And then, just keep reminding people whether you do an agenda for your regular check in meetings, or however you communicate, the dates, the times, the end goal cannot be restated often enough. Because it's our priority, it's not their priority.

Connie: So true. Diane?

Diane: I agree with Dawn. A lot of it is about setting the expectations up front about time and communication protocols. I think that time commitment is really important, especially if it's their first eLearning project, and especially if they've done instructor led work before. Because if I'm a SME, and I have worked on instructor led projects before, and I think, "Oh yeah, I have to review this module. I think I'm having to review five, six bullet points on 20 to 30 slides. Well, I can fit that in, in an hour, before my next

meeting." Well, that same content in an eLearning storyboard is 30 pages. You have to analyze, review, and agree on every single word, and they've never had to do that before.

Diane: It's so much easier to agree on five bullets than on the 500 words that go along with those bullets. And so, making sure that they understand that the commitment is different than what they've experienced before. Things like how they best work. Would they rather have lots of short and small chunks or one big chunk? Is there something specific about their work cycle? I was working with a project recently where it was infectious disease expert and she had on call times. And so, we had to schedule our whole project around when she was, or wasn't on, call.

Diane: So, understanding their dynamics. Finding out in advance who's got leave on the books. Just a simple question like that. It has nothing to do with them being a subject matter expert, but just a human in the world of work. A couple of things that I have found don't work. One is don't give them more time. Giving people more time does not encourage them to meet their deadlines. It just lets them put it off longer. They're still going to start it the day of, or the day after it was due, and you're still going to get it two days late. So, I'd rather get it two days late of a four-day turnaround than two days late of a two-week turnaround time, because that two weeks will not get them on time any better.

Diane: But I have found a few things that do help with getting it on time better. One, send an email the day before it's due reminding them, pleasantly. And I've read this trick recently that I really like where you just add a little sentence that says, "I've got my developer lined up to get started on Tuesday morning, so looking forward to getting your feedback close of business Wednesday." If they know that somebody is going to be sitting there waiting, they still might not do it if something more important... Let's be real. There's no such thing as an eLearning emergency. We are not their top priority.

Diane: But we're going to get bumped up if they're picturing some guy at his desk waiting for those storyboards to come in. Another thing that I've done, if the SMEs are able to meet live, and sometimes they're not, but if it is the type of SME who can meet live, especially during the day, is to set a live review meeting the day something is due. If their feedback on storyboards is due on Tuesday morning, we set a meeting for Tuesday morning, and that does two things. One, people don't like to come to meetings unprepared. Your work just got bumped up in their priority list. It will never

make it to number one, but it absolutely gets bumped up if they have to show up to a meeting.

Diane: And then the other thing it does is it helps you work out the issues, because sometimes you get that feedback a day late. And then there's something that doesn't make sense, something that's contradictory, something you can't do, something you have previously decided you weren't going to do, and you have to talk about it. And then it takes three days to schedule that meeting. So, have that meeting already on the books, so it's due at 9:00 AM on Tuesday. You have your meeting at 9:00 AM on Tuesday. And 11:00 PM, you walk away absolutely ready to work.

Diane: Now, the next step on that. I've done this on one project, where we had a really fast turnaround time, and a high commitment from the client is we had no homework live review meetings. Meaning, Tuesday at 9:00 is when I finished my storyboards. And the first time you see it is on the call. We pull up slide one, we take a minute for everybody to read it, we discuss it. We move onto slide two. Nobody has any homework. Sometimes it's a little maddening and I don't need to be here for this conversation, I just need your answer. But if I am willing to sit there for that two or three hours, I had a three-hour review cycle. Not three days, not five days, not two weeks, I finished my storyboards Tuesday at 9:00. I walked away with actionable, agreed upon, clear feedback by noon, if you can everybody to agree to it.

Connie: That sounds painful, but it does sound quick.

Diane: It works, if you get their commitment, and they show up. Don't you love it when you see a meeting on your calendar and all you have to do is show up, and you know you won't have action items either? That's the best kind of meeting.

Connie: Right.

Dawn: I found that those work better, especially for the clients that are struggling with the storyboards and can't seem to get the concept. So, I have a client right now that we were getting really slow feedback for the physical review of the storyline files. And so, we're doing exactly that thing Diane. I can get more done in two hours as we just go through the rise of versions of the course now and everybody looks at them and loves them, and we make the list, and move on. Because the storyboards are still just paper and pencil, most of the time they can't get that so it really slows them down.

Dawn: So, I 100% concur.

Connie: All of this talk is making me realize that it would be a good idea to educate subject matter experts at the start about the storyboard format rather than only when they receive the storyboards. About what a storyboard look like and how to read it, so they understand what to expect. If you are not someone who is used to visualizing, it can be very hard. That's why I love prototyping and, I guess, you do too.

Dawn: Yeah.

Diane: And that drudgery makes people put it off too.

Connie: Yeah, that's true.

Diane: It's not a fun task for a lot of people.

Dawn: I hate making storyboards and I find that to be the most difficult part of this work. I can totally appreciate for people that are linear thinkers and they're just not accustom to visualization projects that it's really hard, because it's really hard to make them, I think. However, prototyping whenever that works, but you still have to write stuff down.

Diane: You know it's funny, I love writing storyboards. You should call me sometime.

Dawn: Okay.

Connie: One of the most, I think, fascinating aspects of working with the subject matter expert is finding a way to get the tacit information out of their brains and into yours. I call that a mind meld. And for listeners who may not know what tacit information, or tacit knowledge is, it's that knowledge that's difficult to verbalize. It comes out of someone's years of experience and they just don't know how to put it into words. What do you find to be successful for getting tacit knowledge from an expert? Dawn?

Dawn: I try to ask questions like, "On your first day of doing this, what did you need to know that you didn't know, and how did you find that out?" Sometimes it's also well to ask them to list the steps for you, even if they're not done in order to start with. We can always put them in order, but I do, depending if it's procedural or something else. But by them listing out the steps, they remember some of those pieces of information that they're just used to doing. The longer they've been doing something, the

more they're going to just go with it. So yeah, you have to really draw that out.

Dawn: I also try to send them a list of, at least, a couple potential questions, or ways I might ask things when I'm talking with them, to give them time to prepare in advance. Not because I want a tone on all the things, but it gets them thinking about things in chronological order, putting some logic around it. They're more comfortable with the conversation, I think, if they've been given an opportunity to think about it in advance. Most people don't like to talk off the cuff on things. It also gives some signals, I think, especially if this is our first meeting, that this is an important project for the company. This is a little bit about how we'll work together. It's a dialog. I try to ask open-ended questions that draw responses.

Dawn: It's a lot of give and take, and you have to figure out what works best with this guy. It might be different than with this guy. And they might have parallel experience. On paper, it looks like it's all the same, but, boy, just asking the same question of two different people, but twisting it a little bit, makes such a difference. Some people just need to be the expert in the room and trying to figure out how to make sure that they know that you know that is important, and stroke their ego a little bit, maybe. And then the rest of the time you just really need to keep drawing them back to the purpose of what we're doing together and how valuable their contribution is.

Connie: Those are some great strategies. Diane, what are your techniques?

Diane: I was recently doing a large planning project for an association. I was helping them guide them through the design of several multi-day courses. And I had this really experienced bank of people who taught this content for a long time. And I would try to get into what it is that a newbie needed to know, and they would say, "Oh, well you just learn that from experience." So, I'll basically say, "If this comes with experience only, how could we help someone bridge the gap until they get to that point? If they can't get to where you are, how could we get them two steps closer to being able to make that decision?" And often that helps them look at it from a different angle sometimes about that.

Diane: The other thing I do is I get them to talk in stories. Because very often when they tell a story, they reveal the things that they don't know consciously are happening. And so, I can listen for the decision they made that they don't realize they've made, because they made it 1,000 times. But because I'm the ignorant one in the room, and I mean that as a good

thing, I'll go, "How'd you make that decision," or "Oh, so it sounds like there's two different paths you could have chosen." And it is so second nature to them they had no idea.

Diane: SMEs love to tell stories. They have so many of them. And so, if you have trouble getting structured answers, just say, "Hey, can you tell me about a time when something went right, when something went wrong, when somebody stepped in something, when something blew up in their faces?" And it's often easier to get them to talk about the problems and the headaches. And if you're listening really carefully, and you're a fast note taker, you can go, "Oh, you just said something I want to circle back to. Oh, she just mentioned something."

Diane: We just finished a project for some medical professionals, but it was in anesthesiology and they were having that problem. It was for pediatric sedation and they were talking about all these complex processes about how to decide whether to sedate a child in a given situation. And they talked about this complex process and just, fortunately, they were willing to do the work with us. We got it down to a two-by-two grid. It was two questions. Is the procedure long or short? Is it invasive or not invasive?

Diane: Now, will that get them to someone with 20 years of experience, that knowledge? No, but can you get them 30% closer, 50, 60% closer? So sometimes if you just reframe the questions when they say, "Oh, this just comes with experience," I think you can get some good information out of them.

Connie: You know, one technique I like is the think aloud technique. I have to say, "Go through your process and say aloud every single thing you're thinking," and I record it, of course. It's so much easier than it used to be to even just do this remotely. But anyway, having someone think aloud works so well and it starts to make them be able to verbalize their tacit knowledge. I've noticed that not everyone can do that. Not everyone is even aware of what their thinking. But if you can find someone, giving them some problems solve, and some decisions to make, how they do it. The think aloud technique is pretty good.

Dawn: Also, if you can observe them doing the work. There are some people that will give you more information when they're explaining what they're doing, and allowing you to ask questions, while they're completing the tasks or the projects versus just having a conversation. Because some of those things that you would get no other way, you observe them doing, and then they can give you an explanation. Like looking up obscure codes to

something, or whatever. They may not tell you, "Oh, I have to go to this lookup file to get all this information," and that's not listed in the steps anywhere.

Diane: Sometimes you cannot believe what they've left out, because it's such second nature to them. And you go, "Oh, I didn't realize you had to do that." "Oh, yeah."

Connie: One of the most common issues that I hear about when people are working with subject matter experts, and it's that because they don't have an understanding necessarily of learning, they're not a learning professional. They want to include everything possible in a learning experience or a learning journey. So, what are your tips and techniques for dealing and managing that issue?

Dawn: I'll say that first I think of it as I'll pick my battles, especially early on in the process, because I'm trying to build a trust filled fostering relationship. I may make notes on things that we'll have to revisit. I may or may not verbalize that. Rarely is this something that can be tackled at one time. That you have to chip away at it across time. I'll ask questions like, "Is this new to the process? Is the same content also going to be used with people that are experienced?" Because the answers are different than too. Is this something this learner needs to know on the first day they do this work? If that's a yes or a no, then we can move onto what else we need to discuss.

Dawn: Also, I'll ask, as we move through the content, and we're really refining it, I'll ask, "Is this a nice to have, or this is a need to know?" And I do use the word know, I'm going to have to rethink that. But when you start making decisions about this is good information to have, but it isn't going to affect their job performance, and meet the business need, then that moves into the nice to have conversation. And often I want to offer a solution at the same time, whether we're going to have a resource's path, further reading path. Are we going to be creating job aids in addition to the learning path that we're on, learning content path?

Dawn: So that I'm not throwing their information away, I'm giving it a different home. So those are all strategies I employ.

Connie: I like taking the information and putting it somewhere else.

Diane: Sure. I like the pick your battles. We have a saying internally, stop just before you become a jerk. So, fight the good fight, but don't become a

jerk. And sometimes you just put it in. But then I will also use a get in and get out as quickly as possible on that particular point. We're not going to elaborate on it. We're not going to do a reinforcement question about it. We're not going to spend a lot of time on a great visual animation. Get in, get out because people don't really need that too much.

Diane: Sometimes when I try and guide a conversation, and they're just fighting, fighting, fighting, and again, I don't ever want to fight, I just want us to be on the same side, is let them talk first. Just let them talk. Let them talk about the step that doesn't matter. Let them talk about how they've taught it for 30 years. Let them do them first. I'll get to my stuff in the next call. And sometimes you get so much more done. I'll deal with that later.

Dawn: Sometimes you leave it in and then later they draw their own conclusion about how it doesn't fit. So, is it worth fighting over? Sometimes yes, sometimes no, but sometimes it's worth just letting it roll for a while. That's why I try to choose to pick my battles.

Diane: To me, one of the best ways to help negotiate out the nice to know information is to stay on the same side of the table. Because you can't turn it into a fight, because it can feel like that. This should be in the course. I don't really think this needs to be in the course. Absolutely, they need to know this. Well, I'm not sure it's going to be relevant to them. Well, they at least need to be aware of it. How do you fight that? If you have a conversation based around what knowledge should be included the SME will always win, and it shouldn't be about winning or losing. It should be about doing what is best for the learner. And only the learner can meet the business goal. The SME cannot accomplish the business goal, only the learner can.

Diane: So, you've got to be on the same side of the table in the service of that learner. And so, the two tools that I like the best for this. One is a persona, because working with the subject matter experts in advance to craft a very robust persona, including do they have a dog and what's their dog's name? Not that I'm going to write my training differently because the dog was named Ralph isn't of Fido, but because you feel and see them as a person. So, if my persona is Lisa, the procurement specialist, I not only create that persona, but then I use Lisa's name in every conversation. We always go back to Lisa.

Diane: I never ask a question I don't want the answer to. And a question I don't want the answer is, should I put this in the course? I don't want their answer to that question. They don't get to decide what goes into the

course; I do. But I need them to help me decide. And so, instead if they're talking about a piece of content I'd say, "Okay, so let's talk about how Lisa would use that information. What would be a situation Lisa would encounter where this knowledge is going to help her make a good decision? If Lisa has this information and Joe doesn't, what's Lisa going to get right that Joe is going to screw up?"

Diane: And it gets them out of their life and their world, and we're solving the same problem. And then my other tool is Cathy Moore's Action Mapping. It is my absolute, bar none, favorite tool for working with SMEs, especially when I get to do the work from the ground up. If I can't do the work from the ground up, then I do it secretly behind the scenes without them knowing. Because sometimes they'll fight it, because all the content is on slide seven. But it's a fabulous tool and you can walk them, the SMEs, through Cathy Moore's presentation that she has online, because it doesn't use any instructional terminology. It doesn't talk about terminal objective this, and Bloom's taxonomy through that. It uses real-world language and so that you can all, once again, be on the same side of the table, using the same process. And you don't start by talking about knowledge. It's not about knowledge. It's about what you want people to do differently.

Diane: And it chances the whole conversation.

Connie: Right, yeah.

Diane: But then once you get them used to it, and I'll say, "So what would be a situation where Joe would use this?" And sometimes I have to ask it three times, and then finally they'll go, "Huh."

Connie: They don't.

Diane: Yeah, maybe they don't need it, and that's the most beautiful moment there is, when they pull out their own nice to know information.

Connie: That is a beautiful moment. That beautiful moment might be a nice place to end, since we've run out of time. Thank you so much, Dawn and Diane.

Diane: Thanks for having us.

Dawn: Thanks for having us, and I appreciated being able to talk to my friends this afternoon.

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