

Put Context into the SME Role

Six things to share with subject matter experts when working on a training project, so they can sift through their vast and deep knowledge base to present just the right information. **BY KENDRA LEE**



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Subject matter experts (SMEs) play a critical role in training that is on point and delivers results. However, working with SMEs is one of the biggest challenges in training development. Often, trainers simply tell SMEs what they need, by when, and expect that will be sufficient. Or they ask a lot of questions and expect SMEs to emit just the right information. But without context, what SMEs contribute frequently misses the mark. As a result, SMEs are branded as “not understanding” and “difficult to work with,” and nobody is satisfied.

I speak on the topic of SME engagement strategies frequently, yet I recently found this exact problem happening in my own team.

As experts in their field, SMEs can provide information in many perspectives. What *they* need is a context for the information that *you* need. With that context, they can sift through their vast and deep knowledge base to present just the right information to you. Here are the six things I had my team share with our SMEs to put context into their role in a training project:

1. Audience portrait. Create a portrait of who

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the audience is, their age, experience, education, how they like to learn, and even their attention span. If there will be a mix of Millennials and Baby Boomers, SMEs may provide different information for both; then you can choose how to use it.

2. Trigger events. Chronicle the issues the audience is struggling with and the training will address. Paint a clear picture of the problems even if it’s as simple as participants not accurately declaring their spending on their expense reports.

3. Participants’ desired outcomes. Describe what outcomes participants want for themselves if they are able to address the trigger events. What’s important to them personally? Why do they care about these trigger events?

4. Company’s desired outcomes. Disclose the business outcomes and return on investment the stakeholders want from the training. What should participants be able to do differently as a result of the training? How will it help the company?

5. Pressures being experienced. Explain the pressures participants face that will keep them from learning. Pressures may be job related, such as a company mandate of no overtime and, therefore, no after-hours training for hourly employees. Or they may be psychological, such as “we’ve had sales prospecting training before and still couldn’t cold call.”

6. Fears. Ultimately, participants make a choice to implement what they’re learning or not to even try. Describe the fears participants may have that will impede them from trying the new concepts in the training. SMEs may have encountered these exact worries and have suggestions for how to present content or activities in a way that will overcome the concerns.

After a 45-minute discussion, not only did the SMEs have the context for the project, but they expressed heart-felt gratitude for the time my team took to share it. Ultimately, the SMEs wanted to be successful, but they didn’t know how to do that. Context provided them the roadmap they needed for everyone to win. **T**