

Subject Matter Expert Trouble? (Apr 07)

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Solutions to entice subject matter experts to deliver training at your organization

By Sarah Boehle

Can't live with 'em; can't live without 'em. Or so the mantra typically goes when it comes to dealing with internal subject matter experts (SMEs)—the functional experts on whom training departments often depend for help in developing and delivering training.

At their best, internal SMEs are more than willing to find time in their busy schedules to share their functional expertise in support of course development goals; bend over backward to meet their deadlines; and, in some instances, even delight in the opportunity to deliver training in the field.

At their worst, SMEs begrudgingly sign on to training projects; miss deadline after deadline; avoid the training department's calls and e-mails; and view their "SME" role, as one blogger recently lamented, as an "evil akin to getting a root canal with no anesthesia."

If any of these problems sound all-too-familiar, what can your training organization do to encourage SMEs to give you their best and ensure that they not only understand the business importance of training but also possess the desire, time, commitment, and freedom to help you out?

Here's a look at seven SME solutions that work.

1. Stop the blame game. When consultant and author Darryl Sink, president of Darryl L Sink & Associates Inc. in Monterey, Calif., first began researching effective SME-training relationships several years ago in order to develop a workshop featuring a module on the topic, he was surprised to find an array of articles connoting negative depictions of SMEs. "The basic message," says Sink, "was that SMEs are nasty people." That's a dangerous and erroneous assumption, says Sink. "A SME is a SME, and there's no particular reason that these people—who just happen to know a good deal about a particular topic—should, by default, have a nasty personality."

The lesson? While it may be easy to blame your SMEs for your training troubles, the reality is that a troubled SME relationship is your problem to solve. To do just that, try empathizing with your SMEs and do everything in your power to better understand the challenges and roadblocks they face. One technique Sink employs in workshops on this topic, for example, is an experiential activity during which participants take turns playing the role of SME and course designer. "The idea is to encourage empathy for the SME on the part of the instructional designer," says Sink. "If you are assuming the role of a busy SME within the exercise and your instructional designer isn't asking you the right questions or is wasting your time, you tend to realize fairly quickly that SMEs often have pretty good reasons for acting 'difficult.'"

2. Get your hat out of your hand. Don't sell yourself short, advises Kendra Lee, president of KLA Group, a training consulting firm based in Centennial, Colo., who also teaches workshops on this topic. "Training professionals often put their SMEs on a pedestal above the training organization. Then, when things don't go the way trainers would like and deadlines aren't being met, they go to the SME with hat in hand and say things like, 'Gee, I hope you'll be able to meet our timelines.' Or, 'I know you are busy, but please do the best you can.'"

Her advice? Position yourself from a place of power and importance and set SMEs' expectations accordingly. "You set the tone for how you want to be treated, and a lot of SME problems occur when the training organization doesn't feel as important or as valuable as the SMEs on whom they depend."

3. Make it part of their "day" job. Being a SME can be a thankless, stressful job. Why? In many instances, those called upon to provide subject matter expertise to the training function are asked to do so in addition to performing all of the duties associated with their "day job." As such, it's no wonder that SME burnout is such a pervasive problem.

One potential solution? Stop asking so much of your SMEs. Instead, make being a SME part of their "day job." At Verizon Wireless, for example, training doesn't get done unless there is a specific business initiative—such as a new product launch—tied directly to it. Once such an initiative is defined, an ad hoc "core team" comprising representatives from all of the business functions required to execute the initiative successfully—such as marketing, product management, IT, and workforce development—is formed.

There are several benefits associated with this approach, according to Lou Tedrick, the Basking Ridge, N.J.-based company's staff vice president of workforce development. "By design, the entire team becomes our SME for that particular initiative, which makes it easy for the training department to tap into core team members who can serve as SMEs in support of training." In addition, she says, SMEs don't typically view training-related work as an "extra task" on top of their other duties. Why? SMEs who are engaged by Tedrick's team are assigned to work on all aspects of the business initiative to which they are assigned—and because training is integrally woven into the initiative's goals and deliverables, SMEs not only recognize the business importance of training, they view it as part of their job.

4. Tell them why they should care. One of the biggest mistakes training departments make is failing to "sell" training to their SMEs, says Sink. "If you don't explain the business reasons for undertaking the project to SMEs, there's no way they will buy into it, make it a priority, and think it is important."

One option may be to enlist the help of a SMEs manager—or someone else whose opinion the SME respects—to communicate that message for you, suggests Sink. "Most SMEs are invested in and really care about the actual business. If they understand that your training has something to do with the success of the business and they understand the business drivers, needs, and problems or opportunities that the training will address," he says, you'll already be well on your way toward winning their buy-in and ensuring their full participation.

5. Make them accountable. When all that stands between you and meeting your deadline is a SME, what do you do? Build accountability into the relationship by tying SMEs' work to their annual performance appraisal, suggests Rick Western, director of Ernst & Young (E&Y) University Tax for the Americas.

At E&Y University Tax, for example—which provides education and training to approximately 6,000 of the consulting firm's tax professionals in North and South America—SME involvement (which might include everything from helping to develop course content to delivering courses in the field) is typically voluntary. When SMEs do volunteer to serve, however, "they write it into their annual goals on their performance reviews by committing to doing a certain number of hours of training during the course of the year," says Western.

At year's end, these goals are compared to "actuals," and the results are then used to determine overall performance, as well as eligibility for promotion and increased pay. "If an individual's goal was to teach 80 hours, for example, at the end of the year, when that person's performance is assessed, he or she would have to indicate whether the goal was met." Western also notes that SME performance is assessed not only on whether the SME fulfilled his/her hourly training goal for the year, but also on the quality of his/her performance as a SME. If he/she delivered training in the field, for example, the courses he/she taught would "have to have been well received by participants, based on direct feedback from participants," says Western.

Yet another benefit associated with tying SME performance to performance appraisals, notes Western, is the fact that doing so provides the training function with written documentation that helps it to easily and seamlessly identify qualified SMEs, determine their availability, and schedule training assignments accordingly. Once an SME self-identifies him or herself and volunteers to become an SME, for example, the SME-related objectives listed on that individual's performance appraisal are fed into an electronic database that is accessible to E&Y University Tax. The data is then used by E&Y University Tax personnel to assign work to SMEs throughout the year.

6. Go to the top. Consider asking business unit leaders, managers, and department heads to assume responsibility for identifying SMEs in their work areas and assigning them to training projects. That's exactly what Export Development Canada (EDC), a global financing, insurance, and bonding company headquartered in Ottawa, Ontario, Canada, does in order to solicit the involvement of the 120-plus internal SMEs it utilizes each year to develop and deliver courses.

Because the industry in which EDC operates is heavily regulated, the learning and development team has the good fortune of knowing, at the beginning of each year, which courses it needs to update, develop, and deliver, according to Michelle Labarre-Blouin, EDC's manager of learning and development. Armed with this information, her team then meets with the director or vice president of each business unit and provides each leader with a detailed accounting of the company's course development, delivery, and SME needs. Each business unit director, in turn, is responsible for identifying those within his or her group that are either extremely knowledgeable SMEs or would benefit from delivering or developing training as a professional developmental assignment.

The advantages associated with this approach are manifold, according to Labarre-Blouin. The fact that managers themselves handpick SMEs, for example, goes a long way toward demonstrating to SMEs that training is important to the organization, has management's buy-in, and, therefore, deserves their time and attention. In addition, the fact that SMEs' managers enlist SMEs to help with training sends a strong message to SMEs that their managers support and encourage their SME efforts, and, most importantly, won't penalize them for performing training-related work that isn't directly associated with their regular day job.

7. Recognize and reward. We all love to be praised, recognized and rewarded—and SMEs are no exception. Money always talks, of course. But if budget or other factors prevent you from compensating SMEs for their efforts with a monetary bonus, raise, or other incentive, there are many other ways to show your appreciation.

Try making a regular practice of writing thank-you notes, for example, to SMEs and their managers that detail and recognize their contributions. In addition, consider giving your SMEs public recognition within courses that they help to develop, suggests Ernie Brescia, vice president of organizational learning at CENTURY 21 Real Estate LLC in Parsippany, N.J. "For the most part, people love to see their name in print, and if they like their own photo, they like to see that, too. So absolutely feature them in courses that they help develop—whether that means thanking them up front in courseware, mentioning them in class, developing a special presentation slide that recognizes their efforts, or mentioning them in the course handouts or a manual."

Yet another option? Throw a party. At EDC, the learning and development team shows its gratitude to all those who assist with course development and delivery throughout the year by hosting an annual celebration on the training floor. During the festivities, those who contributed to training efforts are publicly identified and feted with awards and gifts. As an added touch, Labarre-Blouin's team also erected a training hall of fame on the walls of the learning and development department, where pictures of notable contributors are hung on the walls each year.