

Tips and Techniques from Zipline

10 Important Roles to Consider When Looking for a SME

Identifying a lead subject matter expert (SME) for new training programs, especially those that will use consultants to develop the curriculum, can be enormously difficult. Not only must lead SMEs be superbly knowledgeable about a certain topic, they should be able to communicate curriculum requirements to others on the team, write and edit well, and take on additional roles as needed.

While not every role will be necessary on every program, the more hats your SME can wear, the better. Choosing someone who can handle several functions will result in a more effective training program. Here's a list of 10 roles that you should look for in a lead SME.

1. Knowledge authority. The most important role of the lead SME is to be the expert in practically everything connected to the program topic, based on depth of knowledge, years of experience, and/or advanced expertise. When seeking the SME, identify someone who typically serves as an information resource and consults on various projects.

2. Content liaison. When working with consultants, the lead SME becomes your company's chief content source. While someone else may serve as the single source of contact with the consultant on the program, the SME is able to ensure that the content and resources are not only accurate and complete but up-to-date throughout program development.

3. SME team leader. If the program requires a group of SMEs, it's advantageous that the lead SME serve as the team's coordinator so that everyone works together, not competitively, to provide content and revisions. This role requires someone with leadership skills plus an understanding of the knowledge, abilities, and personalities of each member.

4. Project management team member. The lead SME shouldn't work separately from the project team but as a full member, providing ideas, insights, updates, revisions, etc. The SME must be able to communicate an accurate picture of the viability of the curriculum while it is being developed, noting if it has adequately captured the essential knowledge.

5. Teacher. The lead SME often must be a master instructor, providing any necessary knowledge about the topic to all members of the project team. This role requires a SME with the understanding of adult learning theory, as well as an ability to answer all questions with just the right content and context.

6. Learner. As the primary content expert, the lead SME must also be the primary learner by gathering additional knowledge and remaining current. The SME should stay on top of new research, events, and organizational issues that may significantly alter, slightly edit, or notably add to the program curriculum, and communicate these in a timely manner.

7. Writer. The lead SME is often required to write learning objectives, additional content, and instructions to the team, as well as to collaborate with instructional designers once curriculum development is under way. The SME should be able to write accurately and precisely, ensuring that errors and confusing information don't end up in the curriculum.

8. Editor. The lead SME's role as an editor is valuable during all review phases, from content quality control to curriculum map, from first-draft modules to final launch product. Using tools such as track changes and collaborative workspaces, the SME must revise content and design so they are correct and clear, but not adding content to expand the scope.

9. Advocate. As the person who's most knowledgeable about the content, the lead SME should also be confident and enthusiastic about the training program and its success. Primarily through email and regular discussions with team members, the SME can be a leading advocate about the topic and help ensure its value is passed along to the learners.

10. Ambassador. The lead SME is often the most frequent contact from your organization with the consultant's instructional design team. In representing you, the SME must be able to serve as goodwill ambassador, offering others guidance and support as well as maintaining a positive attitude with everyone involved in the program.