

Managing the Unmanageable SME

Interview Skills: Self Evaluation Form

Rating Scale:

- 1 = Very Poor
- 2 = Poor
- 3 = Average
- 4 = Good
- 5 = Exemplary

Participant Name:

Take Ownership

◆ **Influence SME Selection and Identify Risks**
Use profiles to request specific SMEs, and then document risks associated with the profiles.

◆ **Set the Process and Expectations**
Clearly articulate how the interview process will work and what SMEs need to do to meet the goals of the project.

◆ **Learn Content Basics**
Request relevant documentation and then create preliminary content outlines and interview questions.

Make a Connection

◆ **Build Relationships and Rapport**
Ask questions in advance to learn about the SME, open meetings with preliminary pleasantries, smile, show genuine interest in the content and the person.

◆ **Establish Credibility**
Exhibit base-level content knowledge, present content outlines prepared in advance of meetings, and ask specific questions that only SMEs can answer.

◆ **Earn Trust**
State early and often that discussions are confidential, and data collected will be validated for accuracy in advance of circulation.

Maintain Focus

◆ **Practice Reflective Listening Techniques** Get the right content in the time allotted, by paraphrasing, clarifying, summarizing and reflecting feelings.

◆ **Reiterate Goals to Minimize Tangents**
Focus on elements of a SMEs response that relate to the interview goals, and then use these statements to redirect conversation.

Set Expectations

◆ **Set the Process and Expectations**
Clearly articulate how the review process will work and how SMEs should provide feedback.

Rating
(1 to 5)

Positive Patterns

Patterns to Improve

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Interview Checklist

Client Name:		
Project Name:		
Status ○ = Not started, + = In Progress ✓ = Completed	<h3>Project Management</h3>	Required Resources
	<ul style="list-style-type: none"> ◆ Project Plan, Roles and Responsibilities, Risks Create a project plan then involve resources to verify tasks, estimates, and predecessors (dependencies). Identify boundaries for each role and risks related to the project, its resources and quality metrics. 	
	<ul style="list-style-type: none"> ◆ Client Kick-off Meeting Get agreement on high level timelines, stakeholders (sponsors, approvers, reviewers, contributors), project resources and expectations for deliverables and review cycles. Set communication strategy for internal and external team members. 	
	<ul style="list-style-type: none"> ◆ Meeting Arrangements Set date, time, necessary resources (people and documentation) and expectations regarding each meeting. 	
	<h3>Instructional Design</h3>	
	<ul style="list-style-type: none"> ◆ Preparation: SME Selection and Risk Identification Consider expertise, experience, and influence to select SMEs who will provide the best content. Communicate risks to Project Manager. 	
	<ul style="list-style-type: none"> ◆ Preparation: Content Review Ask client Project Manager to solicit relevant documentation from subject matter experts and stakeholders. Review the content and begin organizing it in advance of the meeting according to your goals. Meeting time can be used to validate assumptions and further understanding. 	
	<ul style="list-style-type: none"> ◆ Preparation: Interview Strategy Consider the interview goal and communication style of the interviewee, and then select a structured (scripted) or unstructured (unscripted) approach. List interview goals and sample questions, and then distribute a high level agenda to help provide context for interviewees. 	
	<ul style="list-style-type: none"> ◆ Documentation: Content Collection and Draft Creation Open meetings with introductions and expectation setting. Make a connection and maintain focus so you prove that the meeting is a valuable use of time. Ask questions, listen, and take notes. Thank the interviewee. After each meeting, assemble content and send it to SMEs for validation and elaboration as necessary. 	
	<ul style="list-style-type: none"> ◆ Review: Solicit Stakeholder Feedback Set specific expectations for SMEs reviewing materials with regard to how feedback is preferred (separate document or embedded). Send an agenda stating goals and duration for review meeting. Get agreement on necessary changes during the meeting to ensure alignment. 	

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Interview Guidelines

	Technique Isn't Everything, But It Is a Lot	Notes
<input type="checkbox"/>	Listen more, talk less, and ask real questions	
<input type="checkbox"/>	Follow-up on what the participant says	
<input type="checkbox"/>	Ask questions when you don't understand	
<input type="checkbox"/>	Ask to hear more about a subject (trust your instincts)	
<input type="checkbox"/>	Explore, don't probe	
<input type="checkbox"/>	Avoid leading questions	
<input type="checkbox"/>	Ask open-ended questions	
<input type="checkbox"/>	Follow-up, don't interrupt	
<input type="checkbox"/>	Ask participants to talk to you as if you were someone else	
<input type="checkbox"/>	Ask participants to tell a story	
<input type="checkbox"/>	Keep participants focused and ask for concrete details	
<input type="checkbox"/>	Do not take the ebbs and flows of interviews too personally	
<input type="checkbox"/>	Share experiences on occasion	
<input type="checkbox"/>	Ask participants to reconstruct, not to remember	
<input type="checkbox"/>	Avoid reinforcing your participant's responses	
<input type="checkbox"/>	Explore laughter	
<input type="checkbox"/>	Follow your hunches	
<input type="checkbox"/>	Use an interview guide cautiously	
<input type="checkbox"/>	Tolerate Silence	

*Seidman, I. (1998). Technique Isn't Everything, But It Is a Lot. In *Interviewing as Qualitative Research* (pp. 63-78). New York, NY: Teachers College Press.

Case Background

Assume you were recently asked to act as the lead Instructional Designer (ID) on a course that was part of a curriculum redesign project for a Financial Services firm. There were multiple courses, and each had its own team of IDs and SMEs.

You are an external consultant and work directly with a Project Manager (PM) from your company and a PM on the client side.

All you were given by your PM was a course title – *Turning Prospects into Clients*. You also received a style guide detailing the different types of learning content (for example: anecdotes, case studies, application exercises) that must appear in your 30 minute WBT course for new hires. Since there are multiple IDs working on courses in this curriculum, the style guide was used to help maintain a consistent look and feel.

You have been offered three SMEs, and asked to use telephone interviews as a means of content gathering:

- 1 has been with the firm for over 10 years, he was a high performing financial advisor who was promoted to the training department. He manages a virtual team and travels frequently.
- 1 was the designer of the proprietary model that acts as the backbone to this course. This model is still in development.
- 1 is the head of the training department for the firm, and will ultimately approve the content. As a former financial advisor, he would also like to contribute content.

Questions: What do you need to do in order to manage these SMEs?

- What are the risks associated with these SME profiles?
- How would you prepare for your first SME meetings?
- What could you do to make a connection with these SMEs?
- How would you maintain focus during meetings?
- How would you run content review meetings?