



# Managing the Unmanageable SME: Interviewing to Gather Content

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# The Productive Interview

“Interviewing provides more information in a shorter time than most tools.”

Assuming:

- The person whom you are interviewing is truly an expert, and
- You conduct the interview in a competent and productive manner

(Jonassen, Tessmer, Hammum, 1999)

# Methodology

- Telephone Interviews (15) - Stories

Goal: Collect Stories

- (7) Instructional Designers – 1-+20 yrs experience
- (4) Technical Writers – 1 – 10 yrs experience
- (1) Educational Consultant - +20 yrs experience
- (1) Industrial Psychologist – +20 yrs experience
- (2) Project Managers – +10 yrs experience

- Literature Review

Goal: Map Stories with Research

# Research Questions

- **SME Types**  
What are the different types of SMEs that interviewers encounter? How do you manage each type differently?
- **Interviewer Competencies**  
What are the *competencies* of successful interviewers?
- **Processes and Tools**  
What *processes* and *tools* do interviewers use to collect content?
- **Best Practice Techniques**  
What *techniques* do interviewers use to manage unmanageable SMEs?

# References

1. Dalkir, Kimiz. (2005). *Knowledge Management in Theory and Practice*. Oxford, UK: Elsevier Butterworth-Heinemann.
2. Jonassen, D.H., Tessmer, M., Hannum, W. (1999). *Task Analysis Methods for Instructional Design*. Mahwah, NJ: Lawrence Erlbaum Assoc., Inc.
3. Moller, L., Loughner P. (1998). The Use of Task Analysis Procedures by Instructional Designers. *Performance Improvement Quarterly*, v11(3), 79-100.
4. 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.
5. *Using Subject Matter Experts Effectively: Seven Tips on How to Get the Most from Internal Experts*. Retrieved February 20, 2006.

# IDers and Interview Usage

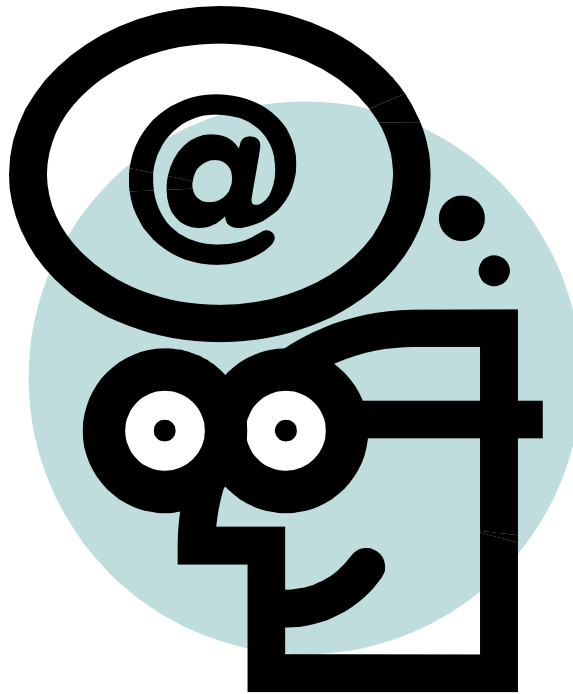
78% of instructional design practitioners reported using individual interviews “always” or “often” for task analysis.  
(Moller and Loughner, 1998)

# What is Content?

<b>Environment</b>	Information/ Data	Resources	Incentives
<b>People</b>	Knowledge	Capacity	Motives

Gilbert, T.F. (1978). *Human competence: Engineering worthy performance*. New York: McGraw-Hill.

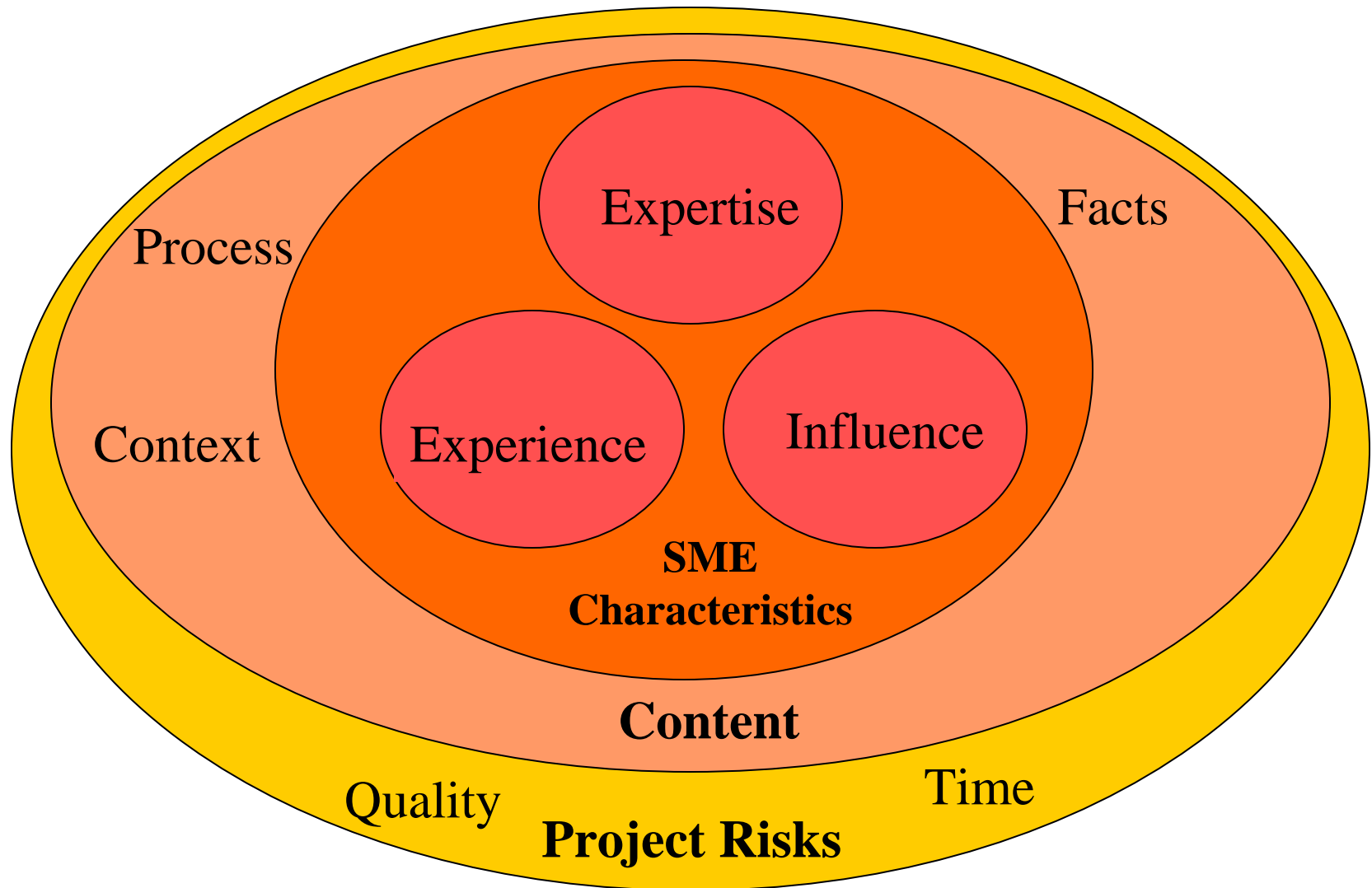
# For Example



# What Makes a SME Unmanageable?



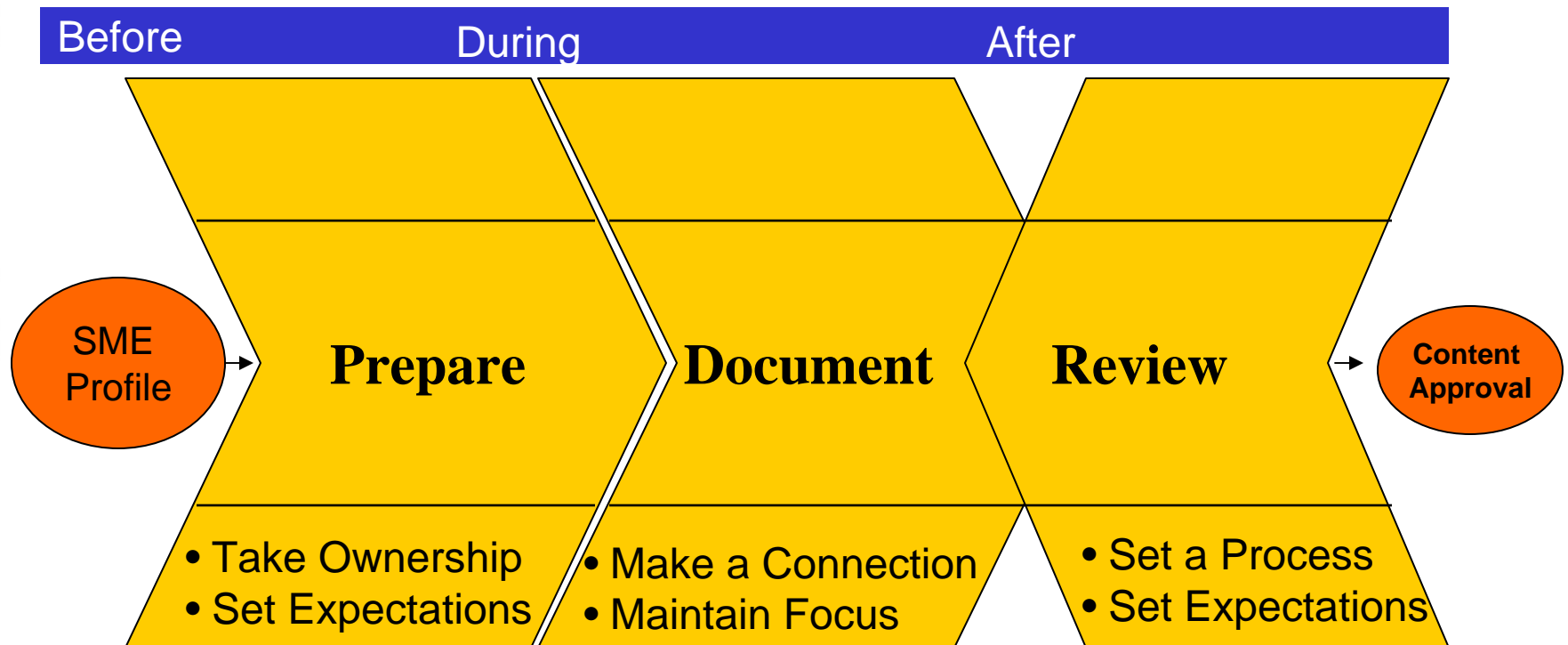
# Selecting the Right SME(s)



# What's the Risk?

- Case 1:
  - Client: Consulting Firm
  - Course: Skill-building Workshop for New Project Managers
  - SME: Published author (external to firm), never been a PM
- Case 2:
  - Client: Insurance Company
  - Course: Salesforce Effectiveness for New Hires
  - Your Job: Document Process and Train Best Practices
  - SME: High performer, promoted to Manager 5 years ago

# Follow an Interview Process



# Prepare: Take Ownership

- SMEs
  - Assist in SME selection
  - Identify risks, then begin working with Project Manager on mitigation strategies
- Process
  - Select interview strategy– structured/unstructured
  - Create agendas, checklists, templates (sample)
- Content
  - Learn the basics
  - Organize content and create preliminary outlines

# Template Example

Lesson:

*Process:*

<b>Task: XXXXX</b> Steps: 1. xxxxx 2. xxxxx 3. xxxxx 4. xxxxx 5. xxxxx	<b>Who Performs and When?</b>
	<b>Common Pitfalls/Problems:</b>
	<b>Consequences/Examples:</b>
<b>Other Notes:</b>	

# How do you handle this?

**Goal:** Self-paced, online delivery of a live workshop

**SME:** Current workshop facilitator

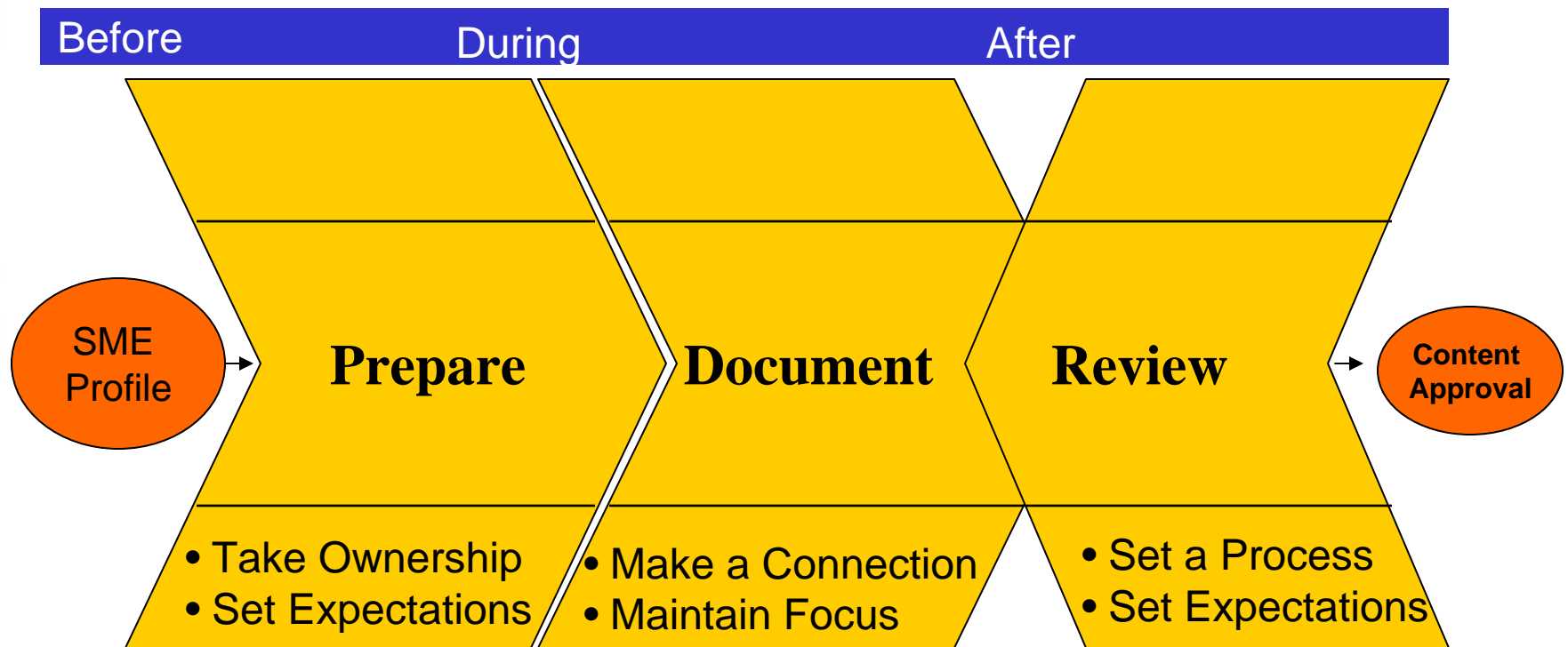
## Take Ownership

- What are the risks?
- What is your interview strategy?
- What tools would help the process?
- What content can you request?

# Prepare: Set Expectations

- Time Commitment
  - Meetings
  - Review cycles
- Content Requirements
  - Scope – how much content?
  - Detail – how deep should content go?
- Process Details
  - Milestones
  - Deadlines

# Follow an Interview Process



# Document: Make a Connection

- **Build relationships and rapport**
  - Research the job and the person (before)
  - Open with introductions, preliminary pleasantries
  - Set expectations and process
  - Show interest and say thank you
- **Establish credibility**
  - Exhibit base-level content knowledge
  - Ask the right questions – only a SME can answer
- **Earn trust**
  - Request openness in exchange for confidentiality
  - Fulfill your promises

# How do you handle this?

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## How can you:

- Build a Relationship
- Establish Credibility
- Earn Trust

# Document: Maintain Focus

- \*Practice Reflective Listening Techniques
  - *Paraphrase* to check accuracy
    - “In other words...”
  - *Clarify* to ask for more information
    - “Could you give me an example of that?”
  - *Summarize* to validate understanding
    - “What I have heard you say so far...”
  - *Reflect Feelings* to mirror speaker intent
    - “You seem frustrated about...”
- Reiterate goals and minimize tangents

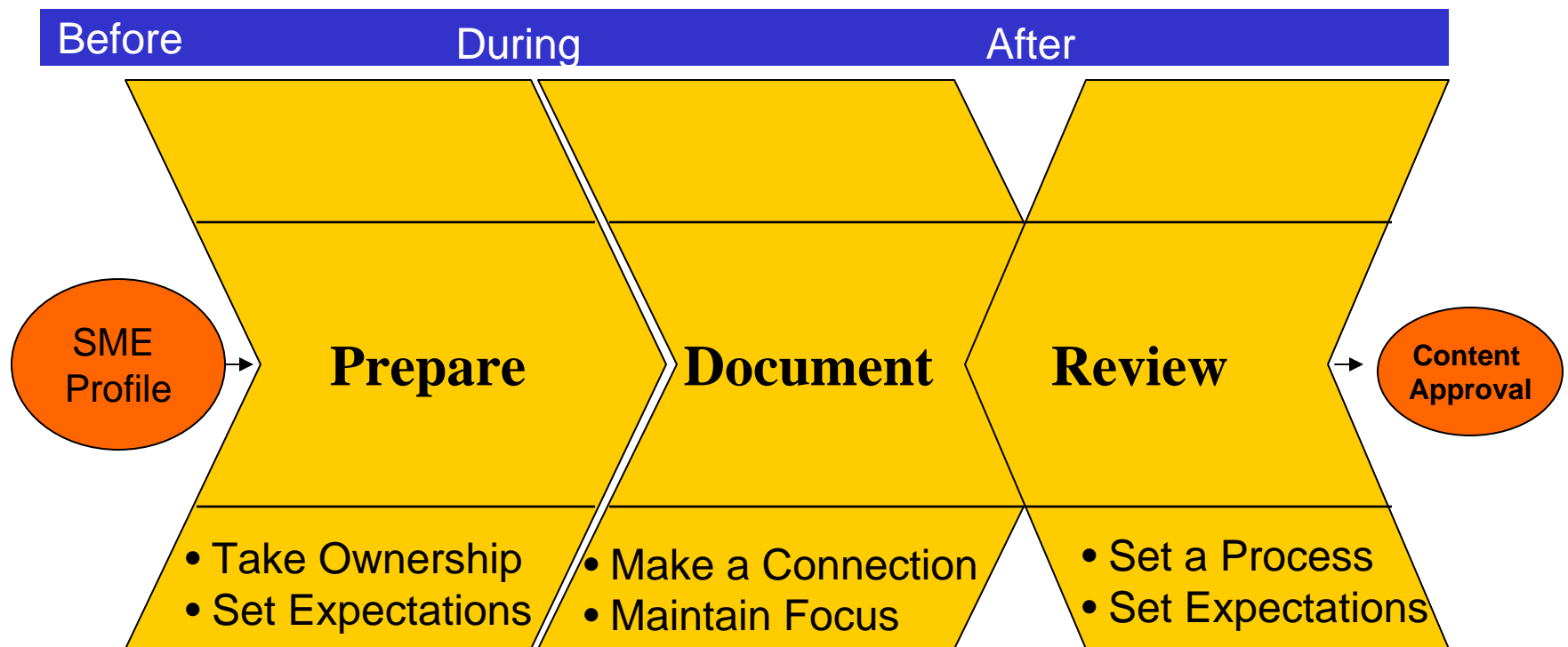
\*See Reference #1

# Review: Set Expectations

- Time Commitment
  - Meeting Preparation (document review )
  - Review Meeting
- Feedback Requirements
  - Format – Word or Excel
  - Detail – Comments or Tracked Changes

# Case Application

## Risk Identification and Management



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