

The Devil's in the Details: Working Successfully with SMEs

Your Questions and Notes	Betsy's Answers and Suggestions
1. What is a SME and how do I find one?	<ul style="list-style-type: none"> • A SME (subject matter expert) is anyone who knows the ins and outs of the topic you need to write about. • You might need more than one SME on a project, each an expert in a particular niche. • SMEs seldom jump out of the woodwork to help you. If you have a contract, ask your project contact person to identify the SMEs you need. If you are all on your own, use Google, personal contacts, and other resources to find SMEs.
2. When is a SME not a SME?	<ul style="list-style-type: none"> • If the person purports to be an expert on the relevant topic, but really isn't, the person isn't a SME. • Look out for people who are grasping at power and territory while turning you into someone to blame if things do not go well. Talk to your project contact person to find <i>real</i> SMEs.
3. What do I need to do to promote success with SMEs?	<ul style="list-style-type: none"> • SMEs who are expected to work with you on their "free" time will not be happy to see you. • Make sure that the SME is built into your contract or other arrangement: <ul style="list-style-type: none"> [For example, "Betsy Frick will have
	<ul style="list-style-type: none"> reasonable access to the customer's staff and resources, as needed, to complete the project in a timely manner." [Before starting a project, negotiate an appropriate percentage of the SME's time. • SMEs deserve compensation for their time and expertise—if not by their employer, then by you or your employer.

<p>4. What else can I do to promote success with SMEs?</p>	<ul style="list-style-type: none"> • Learn how to “read” people quickly so that you can adapt your style to theirs. Pay attention to body language, workspace, and words. • Remember that you are in this together: <ul style="list-style-type: none"> [Openly acknowledge the expertise of the SME. Mention that if you don’t write it, the SME might have to. [Learn as much as possible about the topic so you don’t waste the SME’s time.
<p>5. What gadgets are helpful for recording interviews with SMEs?</p>	<ul style="list-style-type: none"> • Tape recorders and newer devices such as VOIP work well. Be sure to get the SME’s permission before you voice-record any conversation. • After establishing a relationship with a SME, phone calls, email, IM, and blogs may be effective. You may need a paper trail.
<p>6. How do you get a “too-busy” SME to sit down with you to answer questions?</p>	<ul style="list-style-type: none"> • Avoid this situation with a proper agreement. • In advance, ask the SME how you can work best together. • Take the SME to lunch. Be available when the SME is available. Meet in a marathon or in little bits of time—whatever works. Make use of email and other technology. • Provide your list of questions ahead of time.
<p>7. How do you get SMEs to tell you when they change something, mid-project?</p>	<ul style="list-style-type: none"> • Make it easy for the SME—Ask about updates now and then. • End every meeting with, “And what else?” • Include the SME in every review cycle. Get signatures of approval.
<p>8. Do you need to quote SMEs or acknowledge them in an article, book, manual, video, monograph, report . . . ?</p>	<ul style="list-style-type: none"> • Your agreement, copyright, permissions, security, and other items may require or preclude use of names. • Everyone likes to be thanked. A public thank-you is even better. Acknowledge SMEs if permitted. Write a glowing letter for the SME’s personnel file and give the SME a copy.

Resources

- **Flawless Consulting**, Peter Block
- **Getting to Yes**, Roger Fisher and William Ury
- **Coping with Difficult People**, Robert M. Bramson
- **The Gentle Art of Verbal Self-Defense**, Suzette Haden Elgin